



MONTANA



*Montana Office of Tourism &
MercuryCSC Brand Awareness Study
Wave 3 – April 2010*



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Study Background

- In 2010, Montana Office of Tourism and MercuryCSC continue to target Geotravelers* with advertising to increase their awareness of Montana and desire to travel to the state.
- Leisure Trends Group was contracted to conduct an ongoing, proprietary, quantitative brand and advertising awareness study. Three waves of this study have been completed.
- Wave 3 was conducted February 8-25, 2010 as a Pre measurement before the summer marketing launched in March to the three media markets (Chicago, Minneapolis, Seattle).
- Wave 4 will be conducted May 17-June 15 at the peak of the summer campaign as a Post measurement.

Wave:	1	2	3	4
Timing:	February 2009	May 2009	February 2010	May 2010
Geotraveler Control Groups:	National	National	National	National
Geotraveler Media Markets:	Chicago	Chicago	Chicago	Chicago
Geotraveler Media Markets:	Atlanta	Atlanta	Minneapolis	Minneapolis
Geotraveler Media Markets:			Seattle	Seattle
General Population:				National

Study Objectives

- Track Brand and Advertising Awareness, both Unaided and Aided as well as consideration of travelling to Montana in the next 6-18 months and perceptions of what Montana offers to travelers.
- Understand attributes related to the advertising and the Montana Tourism Brand, measuring shifts pre and post advertising in the 2010 media markets: Chicago, Minneapolis and Seattle.
- Employ a random national sample of Geotravelers as a control group to measure the impact of the 2010 Summer campaign.
- Compare Wave 1 National results to Wave 3 National results to assess the impact of the 2009/2010 Winter Campaign.
- Add a general population sample to the Wave 4 survey to measure the impact of the campaign on the larger population.



Methodology

- Leisure Trends Group fielded an online study with 891 targeted consumers (Geotravelers*) utilizing our exclusive MAAP™ database.
 - 191 from Seattle
 - 249 from Chicago
 - 284 from Minneapolis
 - 167 from across the U.S. excluding Washington, Illinois, Minnesota and Montana
- A Dual Survey Methodology was used to ensure accurate targeting of Geotravelers
 - All respondents were segmented via a screening survey regarding their attitudes towards travel to best fit the target profile*. Those qualifying were selected to participate in Wave 3 or held in reserve for Wave 4.

Analytic Notes

- Statistical Significance: Conclusions are made using a statistical exercise known as Significance Testing. Significance Testing determines whether the results are “statistically” different, or the results are merely a “numeric fluctuation” in the data. All of the results in this report are tested at the 95% confidence level – a stringent and typical standard. This means that if the study was conducted 100 times, we would expect to see the same conclusion 95 out of those 100 times.
- Base Sizes: The base size is noted for every chart in this report, as it varies based on how many respondents answered each question.



Subgroup analysis is presented where relevant.* These subgroups are divided as follows:

- Seattle: Those who live in the Seattle, Washington metro area
- Chicago: Those who live in the Chicago, Illinois metro area
- Minneapolis: Those who live in the Minneapolis, Minnesota metro area
- National US W1: Those who do not live in Montana, Illinois or Atlanta (control group for test markets in Wave 1.)
- National US W2: Those who do not live in Montana, Washington, Illinois or Minnesota (control group for test markets in Wave 3.)

-
- Gen Y: Those between the ages of 16 and 27
 - Gen X: Those between the ages of 28 and 41
 - Boomers: Those between the ages of 42 and 60
 - Eisenhower Generation: Those 61 and older

-
- Aware MT: Those who are aware of Montana as a travel destination, unaided or aided
 - Unaware MT: Those who are unaware of Montana as a travel destination, unaided or aided
 - Ad Aware: Those who are aware of Montana advertising, unaided or aided
 - Ad Unaware: Those who are unaware of Montana advertising, unaided or aided

*Complete Subgroup data is provided in the tabs as an appendix.



Executive Summary



- Montana's baseline unaided awareness among the National sample registers at 18% with 17% of Seattle Geotravelers aware. This is followed by Minneapolis (12%) and Chicago (8%).
 - Unaided advertising awareness for Montana is just 3% nationwide but registers at 9% in Seattle and 6% in Minneapolis (Chicago registers at 1%).
 - Yellowstone National Park's unaided awareness (11%) increases significantly over Wave 1 (2%).
 - Glacier National Park's unaided awareness (4%) also increases over Wave 1 (0%).
- Aided awareness is 81% for Montana (a directional increase over Wave 1 at 77%) and registers at 85% in Seattle, 74% in Minneapolis and 65% in Chicago.
 - Yellowstone National Park (97%) and Glacier National Park (90%) lead aided awareness.
- Aided advertising awareness for Montana remains stable (11%) in the National sample, and both Seattle (23%) and Minneapolis (20%) register significantly higher than Chicago (6%).
- The majority (84%) of Geotravelers who are aware of Montana are familiar with the state.
 - In Wave 3 those who are aware of Montana's advertising (20%) are more likely to say they know the state very well than those unaware of the advertising (7%). Also in Wave 3, those who are aware of Montana's advertising (20%) are more likely to say they know Glacier National Park very well than those unaware of the advertising (9%).
 - Geotravelers in Seattle and Minneapolis are significantly more familiar with Montana and Glacier National Park than Geotravelers in Chicago.
 - Eisenhower Generation Geotravelers are significantly more likely to know Montana very or fairly well (51%) than Generation X (28%).
- Four in 10 Geotravelers have visited Yellowstone National Park as an adult, while 38% have visited Montana and 22% have visited Glacier National Park.
- Those who have visited Montana rate the uncrowded location as the top factor in selecting Montana over other destinations. On this factor, Montana scores higher than all other evaluated destinations. Having visited before and the variety of activities are the other strongest draws to Montana.
- Montana equals outdoor activities, mountains and wide open space. The majority of Geotravelers describe the various activities to be enjoyed in the outdoors including skiing, fishing, hiking and camping. Answers which reflect the enormity of the state's beauty also dominate.
 - *"Mountains, wild rivers, mountain biking and hiking trails."*



- The key attributes “Spectacular, unspoiled nature” (4.5 on a five point scale), “Offers a sense of discovery” (4.1) and “Breathtaking experiences” (4.1) register near the top of all attributes associated with Montana.
 - Geotravelers who are aware of Montana advertising are significantly more likely to associate Montana with “Offers a sense of Discovery” (4.2) and “Breathtaking experiences” (4.2) than those unaware of the advertising (4.0).
 - The advertising also affects association of the national parks with Montana.
- Nineteen percent of Geotravelers in the National Wave 3 sample are somewhat or definitely likely to travel to Montana in the next 18 months (compared to 18% in Wave 1).
 - Seattle Geotravelers (18%) are significantly more likely to be definitely travel to Montana compared to Geotravelers in Chicago (7%). Minneapolis registers at 10%.
 - Geotravelers aware of Montana’s advertising in Wave 3 are significantly more likely to be definitely planning to travel to Montana (20%) than those not aware of the advertising (9%).
 - Likelihood to travel to all destinations rises in Wave 3, with Yellowstone National Park registering a significant increase (2.9 mean score vs. 2.6) over Wave 1.
- Social Networking websites experience a significant increase in Wave 3 with over one in ten (11%) selecting these as information sources for all travel destinations compared to just 3% in Wave 1.
 - Gen Y and Gen X are significantly more likely than the older generations to be made aware of destinations via the Internet and Social Networking websites.
 - Friends and family continue to drive interest in visiting Montana in Wave 3, and 27% cite advertising as a source of information for Montana.
- Geotravelers who are not likely to travel to Montana in the next 18 months, cite other destinations coming first on their list as their top reason. Thinking nothing interests them in Montana, that they have already visited or it is too far away and their travel budget being squeezed are also factors.
- Montana continues to offer a contrast to Geotravelers-many spoke of the relaxing, peaceful, uncrowded nature of the state, while also seeing it as a place for adventure.
 - *“Great outdoor adventures and breathtaking country.”*
 - *“An escape from city life.”*



FINDINGS

- Unaided awareness for Yellowstone National Park and Glacier National Park increases in Wave 3.
- Those aware of Montana's advertising are more familiar with what Montana offers and more likely to associate the key attributes with the state.
- Those aware are also more likely to be definitely planning to travel to Montana in the next 18 months.

- Seattle Geotravelers are more aware of Montana, more familiar with the state and more likely to travel there in the next 18 months than Geotravelers in Chicago.

- Social Networking websites increase as an information source in Wave 3.
- Younger generations are far more likely to be made aware of destinations through these sites, and are less likely to be familiar with Montana.

CONCLUSIONS

- The advertising is increasing awareness of the national parks.
- The advertising is also delivering strongly on familiarizing the target with what Montana offers and increasing the desire to travel to the state.

- Seattle is currently a very strong feeder market to Montana and should continue to be looked at as a strong source of visitors.

- A prominent social media presence and word of mouth marketing is critical to positively impact the younger generations.



Detailed Findings



Brand Awareness & Perceptions



Montana's Unaided Awareness at 18%

Q: Thinking about all of the destinations within the United States, but outside your home state available for you to chose from for these non-business trips, please list all of the states that come to mind?

Unaided Awareness as a Travel Destination					
	Seattle (A)	Chicago (B)	Minneapolis (C)	2009 National W1 (D)	2010 National W3 (E)
CALIFORNIA NET	64%	52%	51%	42%	43%
FLORIDA NET	29%	57%	55%	29%	42%
COLORADO NET	11%	23%	24%	30%	30%
WASHINGTON NET	2%	18%	18%	23%	24%
NEW YORK NET	25%	33%	33%	23%	23%
UTAH NET	9%	7%	7%	23%	23%
NEVADA NET	33%	31%	27%	18%	19%
ARIZONA NET	27%	27%	24%	22%	19%
MONTANA NET	17% (B)	8%	12%	20%	18%
Texas	9%	16%	22%	12%	17%
OREGON NET	43%	7%	9%	25%	15%
Washington DC	16%	10%	15%	11%	15%
ILLINOIS NET	9%	2%	27%	12%	14%
MASSACHUSETTS NET	8%	17%	13%	12%	14%
New Mexico	7%	10%	8%	15%	14%
WYOMING NET	4%	1%	4%	19%	14%
LOUISIANA NET	8%	9%	10%	5%	13%
Maine	4%	6%	8%	19%	13%
Yellowstone National Park	7%	5%	6%	2%	11% (D)
GEORGIA NET	6%	9%	8%	9%	10%
TENNESSEE NET	3%	9%	6%	11%	10%
Vermont	2%	1%	2%	16%	10%
Alaska	13%	6%	7%	12%	9%
South Carolina	4%	7%	7%	8%	9%
VIRGINIA NET	5%	3%	4%	8%	9%
Hawaii	39%	19%	16%	13%	8%
North Carolina	5%	9%	7%	17%	8%
Grand Canyon	4%	7%	6%	2%	8%
Canada	6%	2%	6%	-	8%
Pennsylvania	4%	8%	5%	9%	7%
New Hampshire	1%	0%	1%	12%	7%
Michigan	4%	18%	8%	10%	6%
MINNESOTA NET	5%	10%	3%	4%	5%
South Dakota	3%	3%	10%	3%	5%
Glacier National Park	3%	1%	2%	0%	4%
Rocky Mountain National Park	1%	-	1%	0%	3%

In the Wave 3 National sample, 18% of Geotravelers mention Montana when asked about travel destinations available to them. While this is lower than Wave 1, it is not a significant decline and is within the margin of error for the study.

Unaided awareness increases for both National Parks in Wave 3, with a significant increase from 2% to 11% for Yellowstone National Park and increase from 0% to 4% for Glacier National Park.

In the test markets of Seattle, Chicago, and Minneapolis unaided awareness for Montana registers at 17%, 8% and 12%, respectively.

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

*NET includes mentions of specific cities or parks/attractions within that state. Yellowstone NP included in MT NET, and not included in WY NET.

Destinations with lower than 5% awareness for the National population not shown, with the exception of the parks.



Montana awareness higher in Seattle & Minneapolis

Q: Are you aware of the following locations as travel destinations?

Nearly all (97%) Geotravelers are aware of Yellowstone National Park and 90% are aware of Glacier National Park as travel destinations. Just over eight in ten (81%) overall are aware of Montana in Wave 3, a directional increase from Wave 1, although not a significant shift. Significantly more Geotravelers are aware of Montana as a travel destination in Seattle (85%) and Minneapolis (74%) than in Chicago (65%).

Aided Awareness as a Travel Destination					
	Seattle (A)	Chicago (B)	Minneapolis (C)	2009 National W1 (D)	2010 National W3 (E)
Yellowstone National Park	96% (B)	92%	93%	96%	97%
Alaska	95%	88%	90%	96%	94%
Colorado	85%	86%	91%	92%	93%
California	97%	93%	91%	89%	91%
Glacier National Park	86%	80%	83%	87%	90%
Grand Teton National Park	84%	69%	74%	84%	87%
Rocky Mountain National Park	68%	80%	69%	77%	81%
Utah	80%	69%	69%	77%	81%
Montana	85% (BC)	65%	74% (B)	77%	81%
Washington	91%	73%	70%	76%	80%
Vermont	70%	67%	64%	73%	78%
Oregon	90%	65%	66%	74%	78%
Maine	68%	71%	70%	75%	76%
Wyoming	73%	68%	71%	74%	75%
Idaho	76%	52%	55%	63%	59%
Michigan	52%	88%	66%	54%	54%

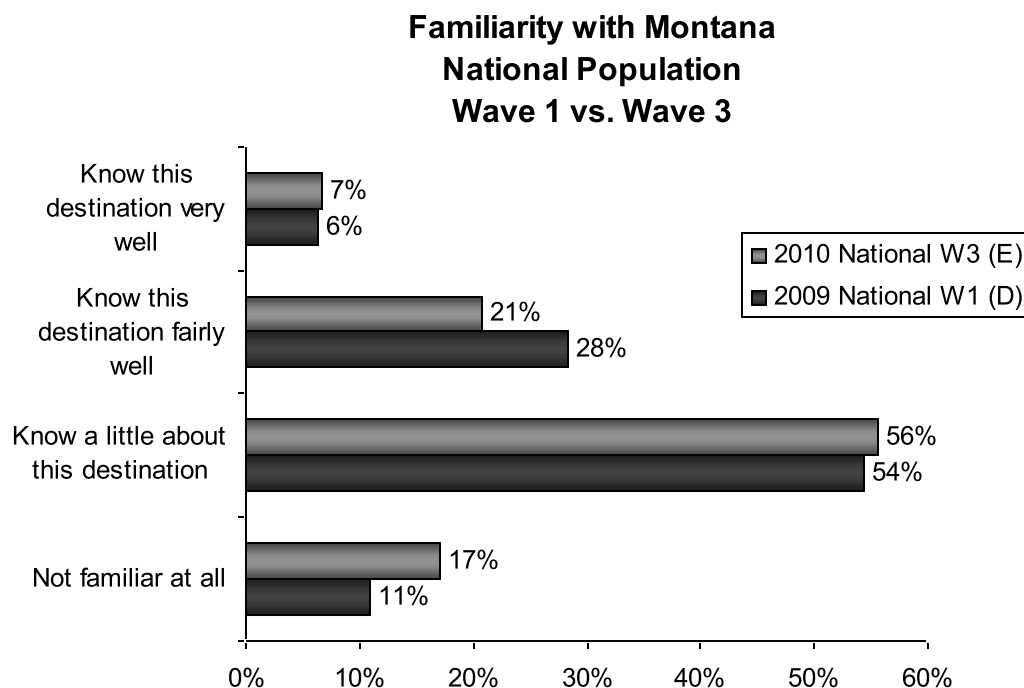
Base = 191 Seattle, 249 Chicago, 284 Minneapolis, 226 National US W1, 167 National US W3 Geotravelers

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.



Familiarity with Montana remains stable

Q: How familiar are you with the following destinations?



Eighty-four percent of Geotravelers who are aware of Montana as a travel destination know at least a little about the state in Wave 3 (combining top three scores). This is a decrease from Wave 1 at 89%, although not a significant decline.

- Geotravelers in Wave 3 who are aware of Montana's advertising (20%) are significantly more likely to say they know Montana very well than those who are unaware of the advertising (7%).*
- Eisenhower Generation Geotravelers are significantly more likely to know Montana very or fairly well (51%) than Generation X (28%).

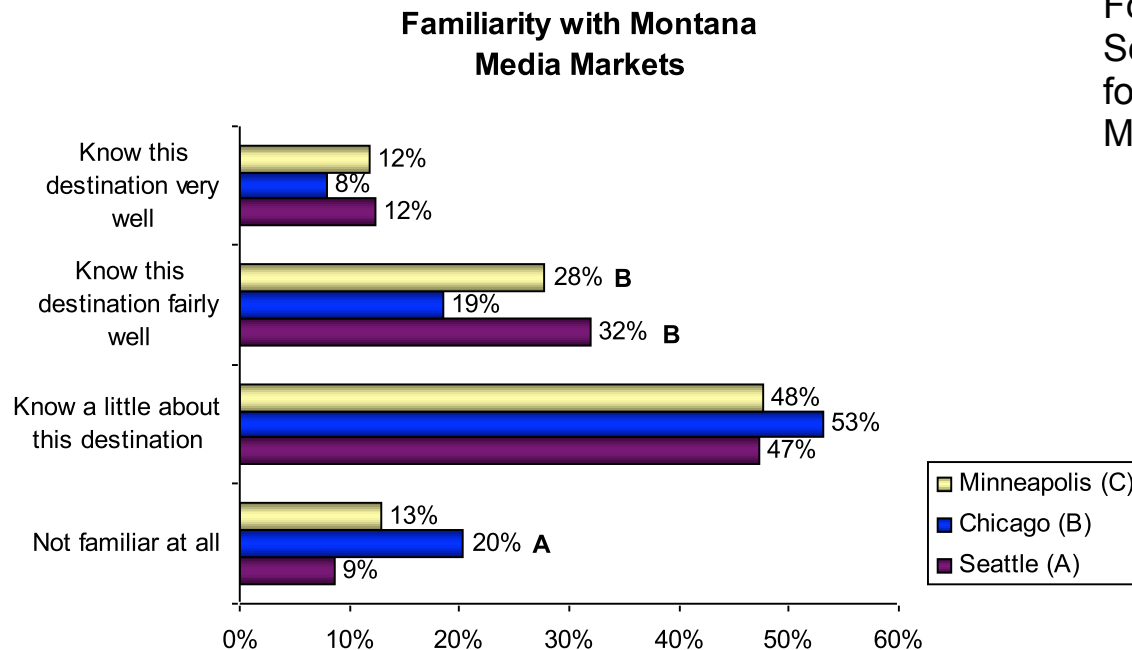
*Sub segment data noted throughout report available in the tabs as an appendix.

Base = 163 Seattle, 162 Chicago, 210 Minneapolis, 173 National US W1, 135 National US W3 Geotravelers Aware MT



Seattle & Minneapolis show higher familiarity than Chicago

Q: How familiar are you with the following destinations?



Forty-four percent of Geotravelers in Seattle know Montana very or fairly well, followed by 40% of Geotravelers in Minneapolis.

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.



National Parks in Montana remain stable

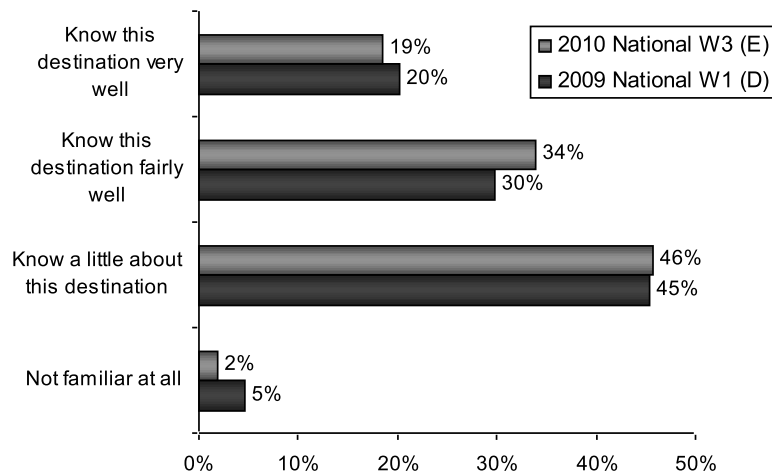
Q: How familiar are you with the following destinations?

Ninety-nine percent of Geotravelers aware of Yellowstone National Park have some knowledge of that park in Wave 3, compared to 95% in Wave 1. In Wave 3, 83% of those aware of Glacier National Park have some knowledge of that park compared to 90% in Wave 1.

- Men (41%) are more likely to know Yellowstone fairly well compared to women (33%) as well as knowing a little about Glacier (54%) compared to women (46%).
- Boomers (60%) are more likely to know Yellowstone fairly or very well compared to Gen X Geotravelers (44%).
- Gen X Geotravelers (24%) are more likely to not be at all familiar with Glacier than Boomers (13%) or the Eisenhower Generation (10%).

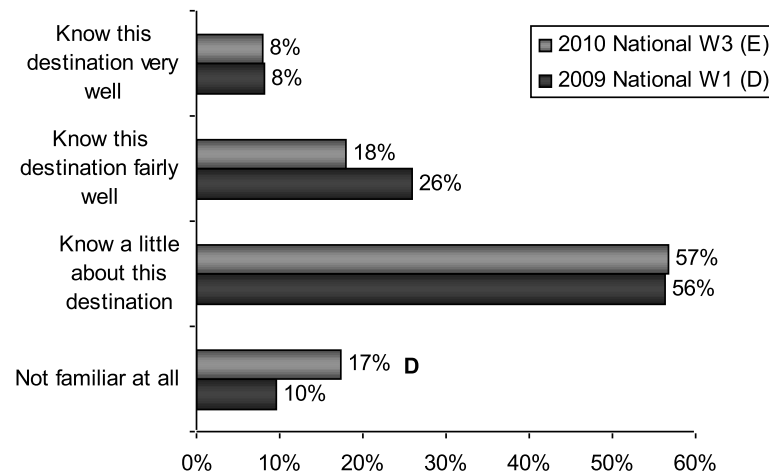
In Wave 3, Geotravelers who are aware of Montana's advertising (20%) are more likely to say they know Glacier National Park very well than those who are unaware of the advertising (9%).

**Familiarity with Yellowstone National Park
National Population
Wave 1 vs. Wave 3**



Base = Varies based on awareness

**Familiarity with Glacier National Park
National Population
Wave 1 vs. Wave 3**



Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.



Yellowstone better known than Glacier in test markets

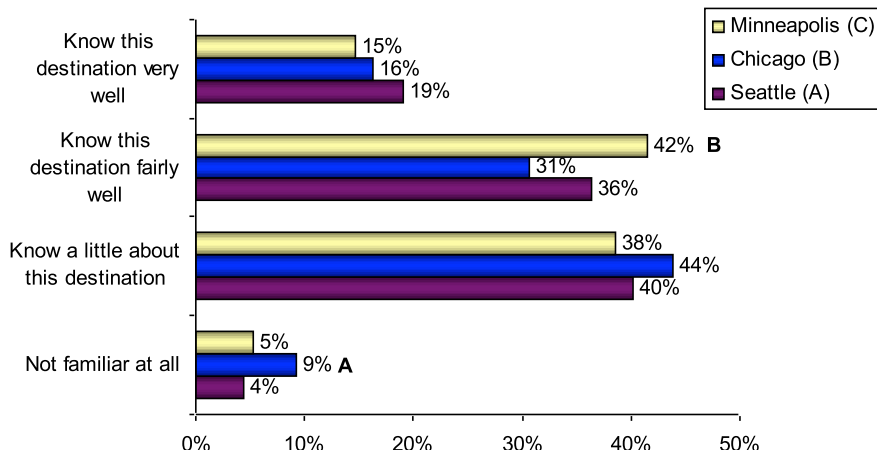
Q: How familiar are you with the following destinations?

In all three test markets, there are fewer Geotravelers who are not at all familiar with Yellowstone than Geotravelers not at all familiar with Glacier.

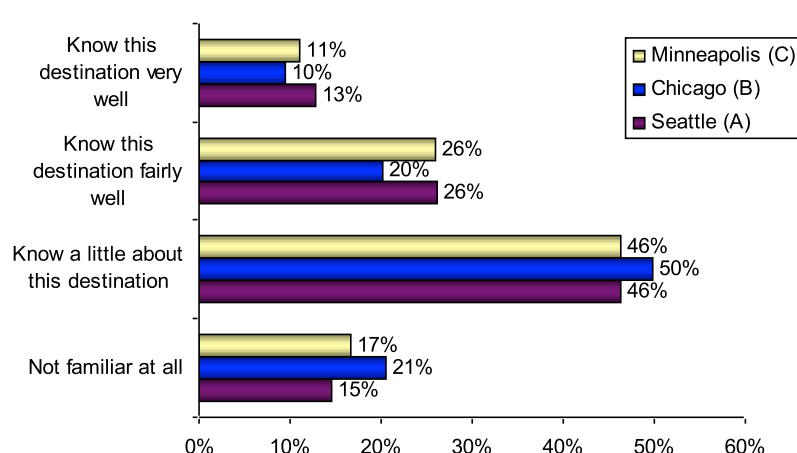
In Minneapolis, 57% of Geotravelers know Yellowstone National Park fairly or very well compared to 55% of those from Seattle and 47% of those from Chicago.

In Minneapolis and Seattle, 39% of Geotravelers know Glacier National Park fairly or very well compared to 30% of those from Chicago.

**Familiarity with Yellowstone National Park
Media Markets**



**Familiarity with Glacier National Park
Media Markets**



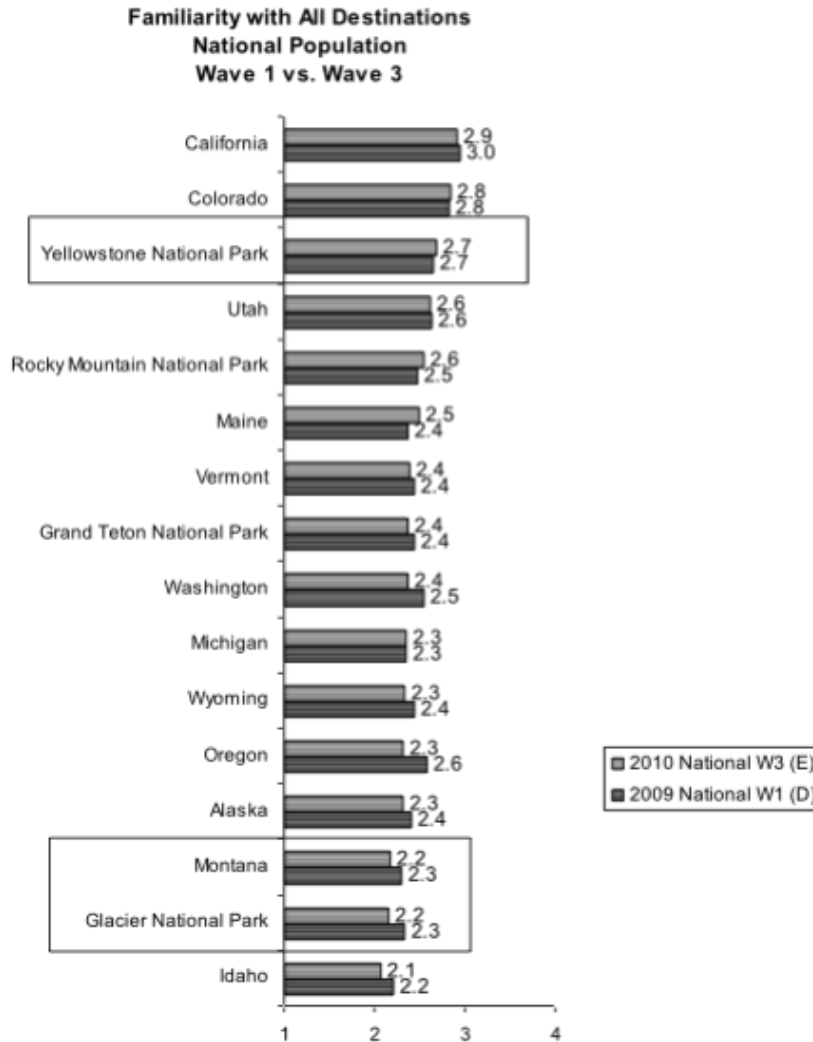
Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = Varies based on awareness



Those aware of advertising more familiar

Q: How familiar are you with the following destinations?



Yellowstone National Park follows only California and Colorado in familiarity with Geotravelers. There are no major shifts in Wave 3 over Wave 1.

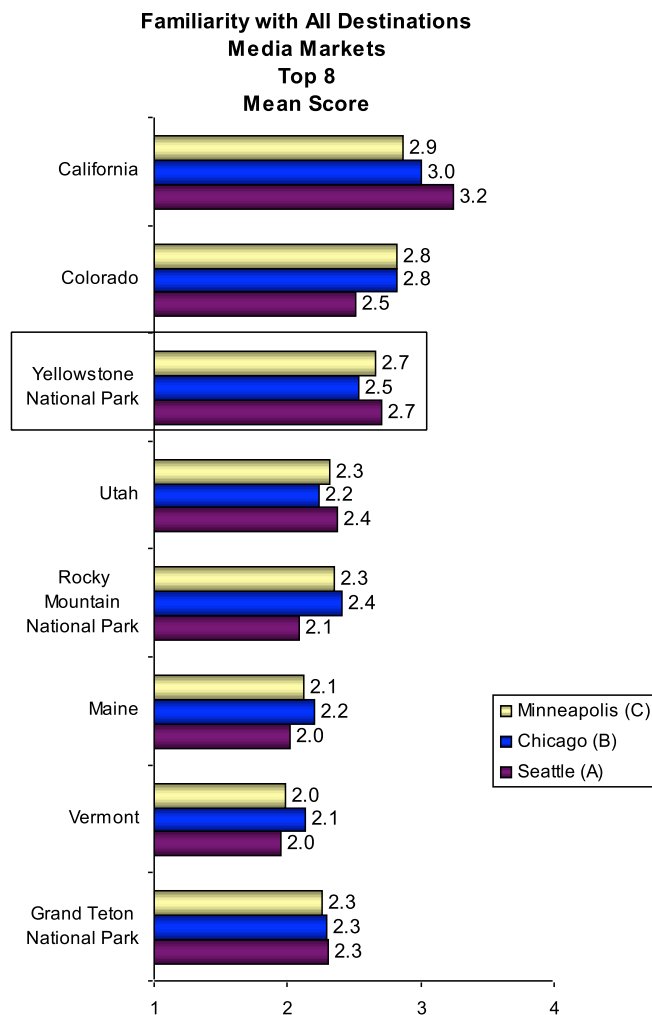
In Wave 3, Geotravelers who are aware of Montana's advertising are significantly more familiar with Montana and Glacier National Park (2.6) than those unaware of the advertising (2.2).



Minneapolis & Seattle show higher familiarity

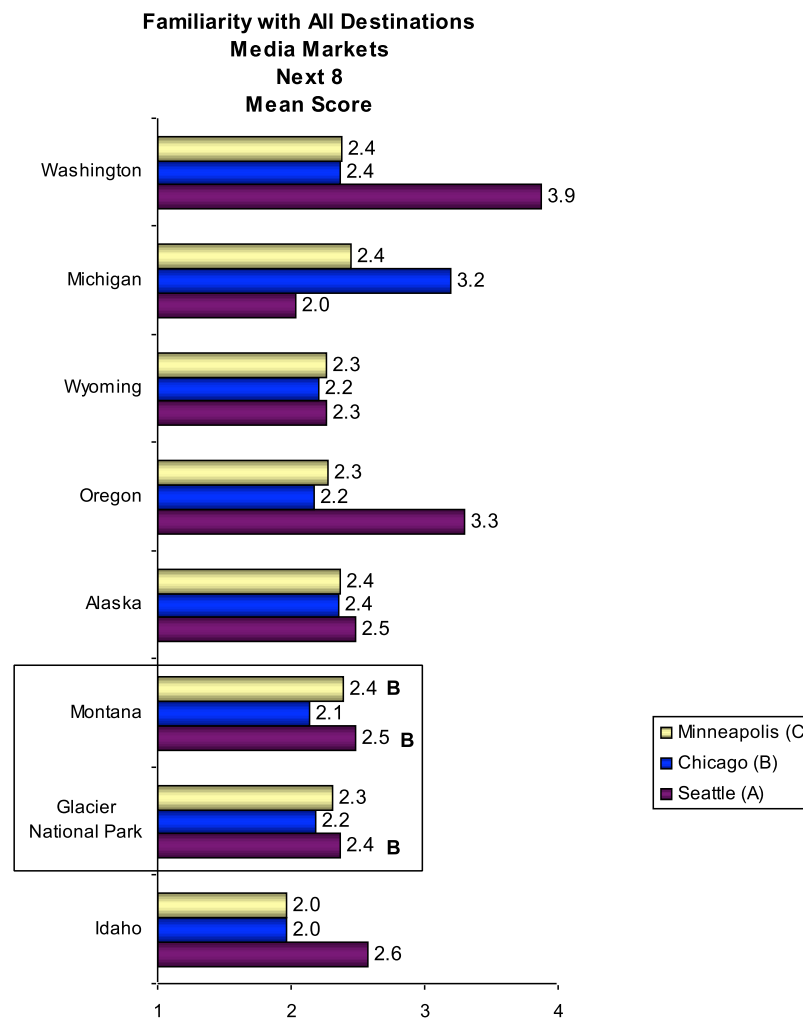
Q: How familiar are you with the following destinations?

Geotravelers in Minneapolis and Seattle are more familiar with Montana and Glacier National Park than Geotravelers in Chicago.



Base = Varies based on awareness

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Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

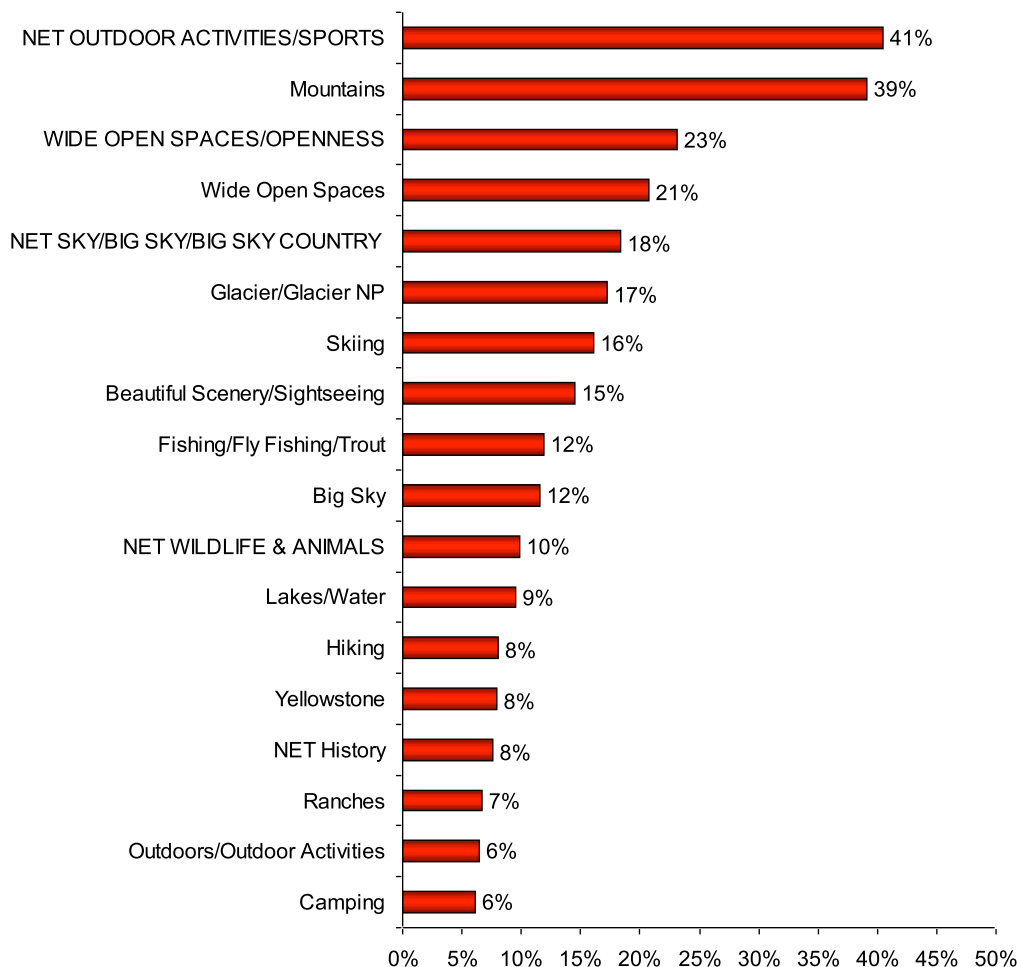
Confidential/Proprietary



Montana = outdoor activities and mountains

Q: You mentioned being familiar with Montana as a travel destination. In your own words, please describe what comes to mind when you think of Montana?

Familiarity with Montana Top 18



Base = 570 Geotravelers Familiar with Montana

When Geotravelers who are familiar with Montana describe the state, the most common answers reflect the various activities to be enjoyed in the outdoors including skiing, fishing, hiking and camping. Answers which reflect the enormity of the state's beauty-the mountains, the wide open spaces, and sky are also dominant.

- Geotravelers from Minneapolis are significantly more likely to mention skiing (27%) in connection with Montana than those in Seattle (12%) or Chicago (10%).

Geotraveler Comments:

- *"Mountains, pristine wilderness, fly fishing, skiing, relatively uncrowded."*
- *"Great camping with incredible scenery and beautiful rivers."*
- *"Mountains, wild rivers, mountain biking and hiking trails."*
- *"It's a diverse state. It's so big. Unmatched beauty. Great golf."*

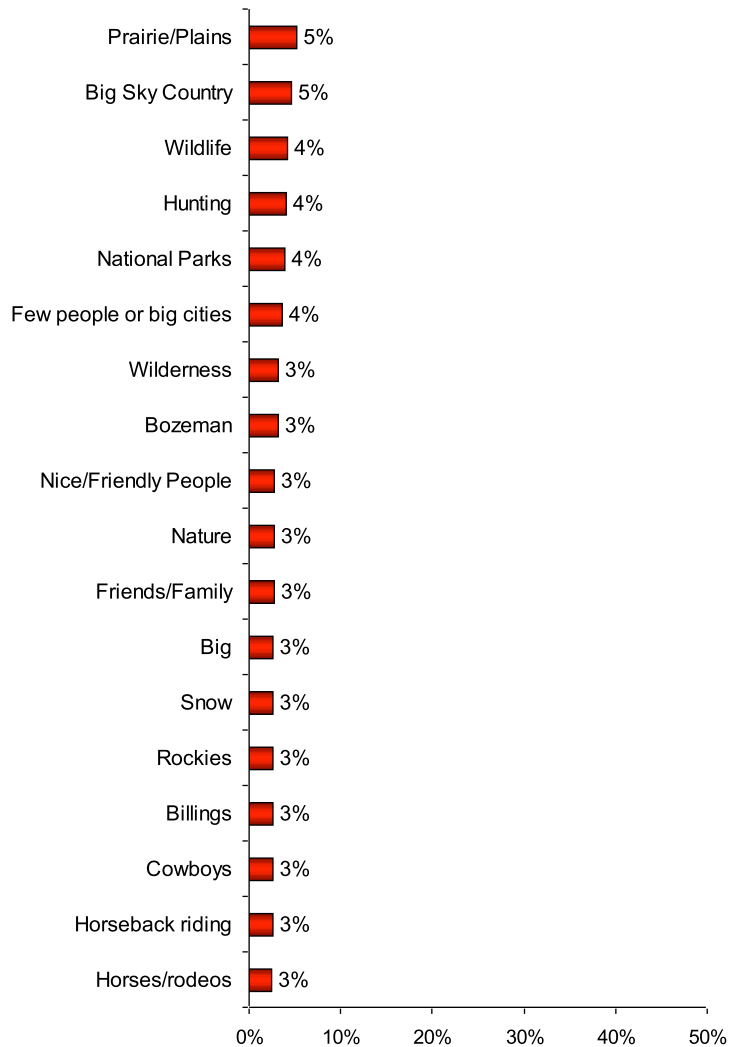


Plains as counterpoint to mountains

Q: You mentioned being familiar with Montana as a travel destination. In your own words, please describe what comes to mind when you think of Montana?

Familiarity with Montana

Next 18



Base = 570 Geotravelers Familiar with Montana

Many Geotravelers comment on the contrast of the plains and the mountains, and the uncrowded nature of Montana.

Geotraveler Comments:

- *"Rocky Mountains in the west, Glacier National Park, great plains and thunderstorms in the east."*
- *"A beautiful place to seek solitude and find it. Glacier National Park is a must-see for everyone, at least once in a lifetime, if not ten times. I never get tired of Montana because it has such diversity of landscapes and activities."*
- *"Wide open spaces, cattle ranches, beautiful landscapes, friendly people, hiking, horseback riding."*
- *"I have some friends that live in a very remote cabin. Very rustic, isolated and beautiful!"*

*Perceptions with lower than 3% incidence for all Geotravelers not shown.



Advertising Awareness & Understanding



Almost one in ten Seattle Geotravelers mention advertising

Q: What state other than your home state have you seen or heard advertising for in the past three months or so?

In the test market of Seattle, 9% of Geotravelers are aware of Montana's advertising, and 6% are aware in Minneapolis, significantly more than in Chicago.

- While awareness among the national sample shows a decline, the shift is not significant and is within margin of error for this study.

Unaided Advertising Awareness					
	Seattle (A)	Chicago (B)	Minneapolis (C)	2009 National W1 (D)	2010 National W3 (E)
FLORIDA NET	20%	53%	40%	38%	38%
CALIFORNIA NET	45%	26%	17%	34%	30%
NEVADA NET	29%	22%	24%	18%	24%
COLORADO NET	7%	9%	12%	21%	15%
UTAH NET	7%	5%	5%	15%	15%
Hawaii	37%	11%	7%	9%	14%
ARIZONA NET	6%	9%	12%	9%	14%
Canada	33%	6%	13%	-	14%
Disney World/Disneyland	16%	7%	10%	0%	12%
Alaska	14%	3%	9%	13%	11%
NEW YORK NET	7%	5%	6%	12%	11%
Texas	8%	8%	9%	10%	8%
LOUISIANA NET	2%	5%	1%	4%	7%
New Mexico	2%	1%	0%	7%	7%
South Carolina	1%	1%	1%	5%	6%
Mexico	11%	8%	14%	-	5%
North Carolina	1%	2%	1%	8%	5%
Michigan	1%	30%	3%	5%	5%
WYOMING NET	2%	0%	1%	6%	4%
Alabama	1%	-	1%	3%	3%
MONTANA NET	9% B	1%	6% B	6%	3%
OREGON NET	8%	0%	0%	6%	3%
TENNESSEE NET	1%	3%	2%	5%	3%
WASHINGTON NET	2%	2%	2%	4%	3%
Washington DC	1%	1%	1%	0%	3%
Vermont	1%	1%	-	10% E	3%
VIRGINIA NET	1%	0%	0%	7% E	3%

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.



One in ten aware of Montana advertising when aided

Q: Please select all the out-of-state destinations listed below that you have seen or heard advertising for in the past three months or so.

Just over one in ten (11%) Geotravelers are aware of Montana's advertising in Wave 3. Significantly more Geotravelers in Seattle (23%) and Minneapolis (20%) are aware of the advertising than those in Chicago (6%).

Yellowstone National Park's advertising registers with 22% of Geotravelers and Glacier National Park's advertising is recalled by 13%.

Aided Advertising Awareness					
	Seattle (A)	Chicago (B)	Minneapolis (C)	2009 National W1 (D)	2010 National W3 (E)
Alaska	55%	33%	46%	45%	47%
California	73%	49%	39%	44%	42%
Colorado	15%	26%	33%	30%	37%
Utah	22%	11%	11%	24%	28%
Yellowstone National Park	15%	11%	13%	19%	22%
Vermont	3%	6%	4%	15%	16%
Michigan	6%	64%	16%	8%	13%
Glacier National Park	9% B	3%	6%	9%	13%
Wyoming	7%	8%	13%	13%	11%
Montana	23% B	6%	20% B	11%	11%
Maine	4%	6%	6%	13%	10%
Washington	29%	6%	5%	10%	10%
Rocky Mountain National Park	3%	4%	4%	9%	9%
Grand Teton National Park	3%	4%	2%	10%	8%
Idaho	17%	4%	2%	11%	8%
Oregon	23%	3%	5%	13%	7%
None of these	11%	16%	29%	24%	20%

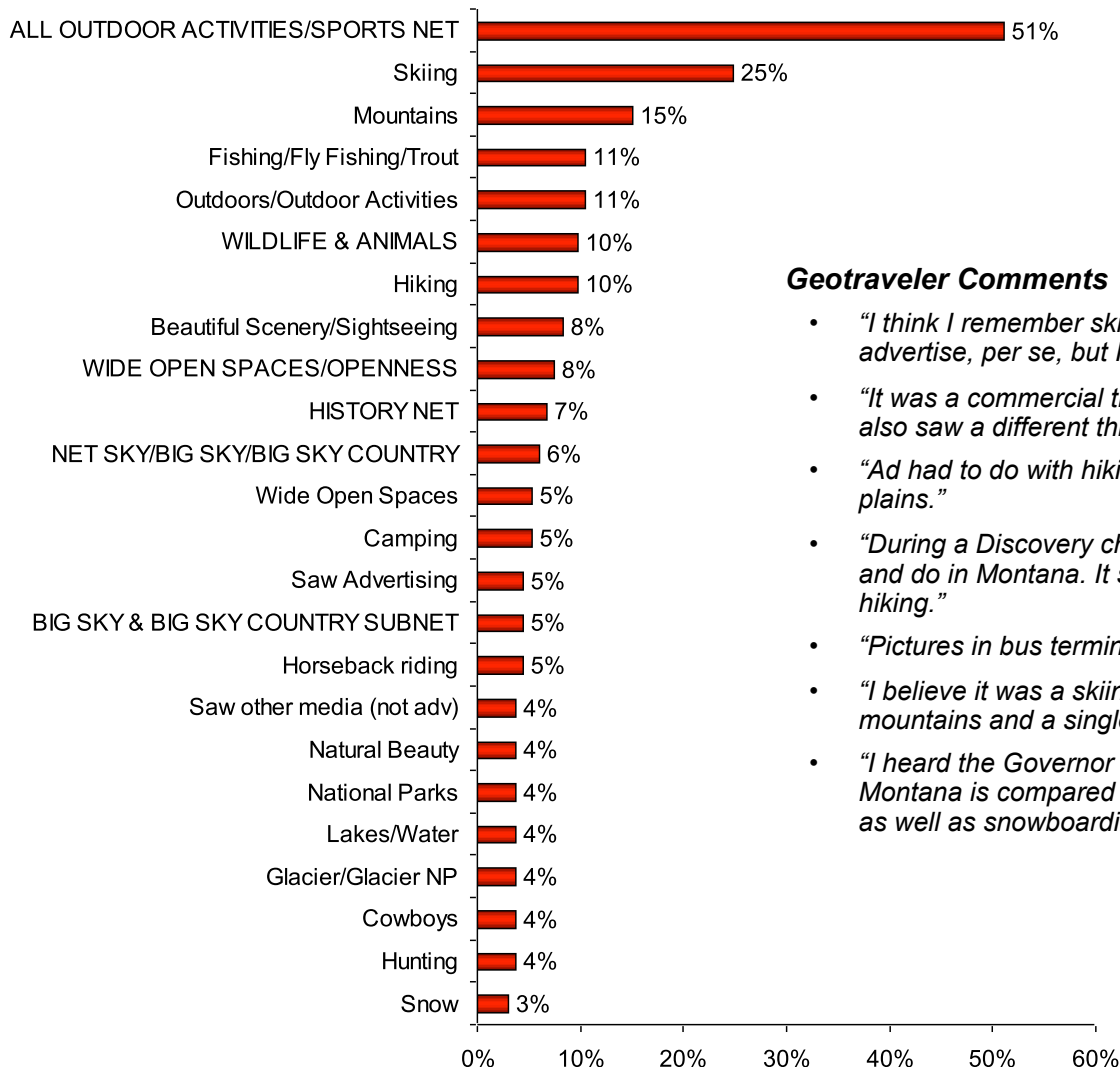
Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.



Advertising filled with outdoor activities and sports

Q: Please describe what you saw or heard in the Montana advertising to the best of your ability.

Recall from Advertising



Those Geotravelers who remember seeing advertising from Montana in the past three months describe outdoor activities and sports such as skiing, fishing, hiking and camping.

Geotraveler Comments

- "I think I remember skiing in particular. My not-for-profit magazine doesn't advertise, per se, but I know it touts all the natural wonders of Montana."
- "It was a commercial that showed streams, valleys, mountains and wildlife. I also saw a different thing on Big Sky for skiing."
- "Ad had to do with hiking in Glacier NP as well as featuring a cowboy and open plains."
- "During a Discovery channel program, they aired a commercial about all to see and do in Montana. It struck me as a good possible vacation site for hunting or hiking."
- "Pictures in bus terminal showing beautiful natural scenery."
- "I believe it was a skiing adventure in Red Lodge. Beautiful snow covered mountains and a single skier."
- "I heard the Governor of Montana talking about how similar the climate in Montana is compared to Minnesota... and how there is good skiing in Montana, as well as snowboarding and such."

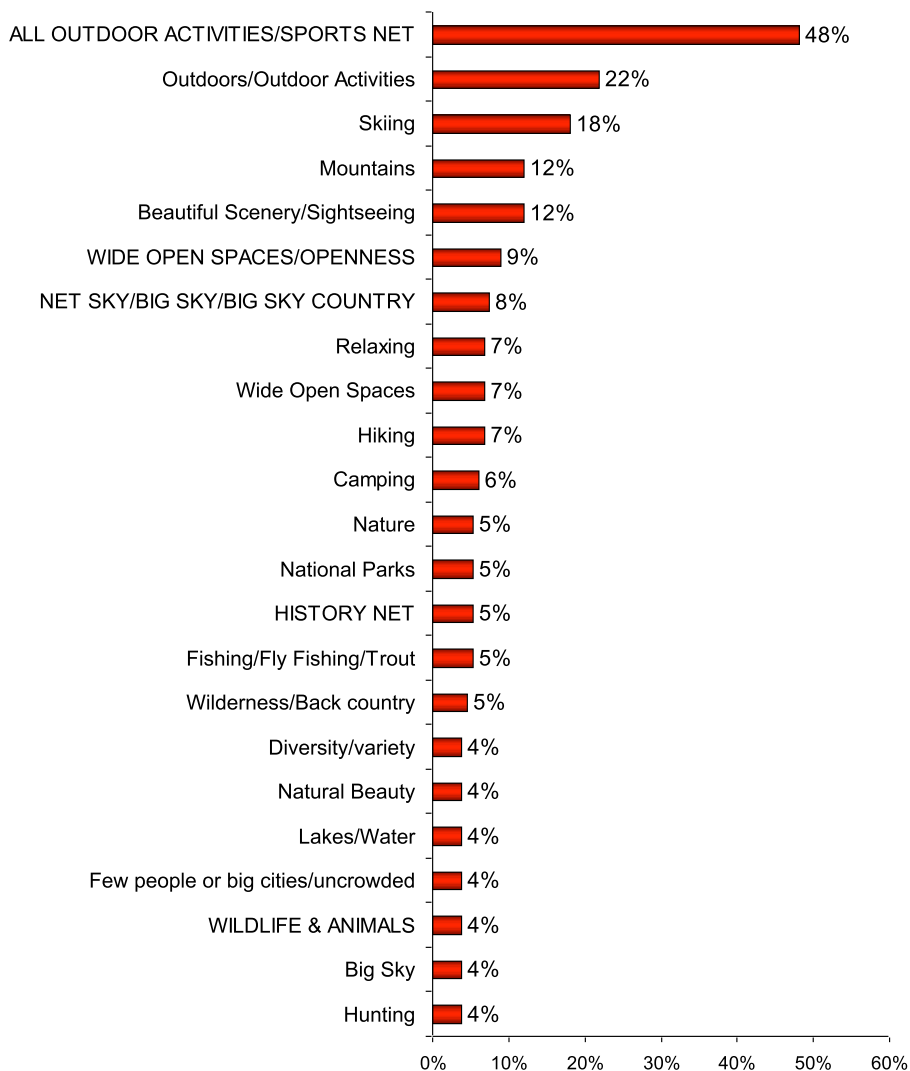
Base = 133 Geotravelers Aware of Montana's Advertising



Which translates to what Montana offers

Q: In your own words, what do you understand Montana offers as a travel destination after seeing the advertising?

Montana offers based on Advertising



Base = 133 Geotravelers Aware of Montana's Advertising

Geotravelers who recall the advertising believe Montana offers the images represented in the advertising-outdoor activities and sports like skiing, as well as mountains, beautiful scenery and wide open space.

Geotraveler Comments

- *"Adventure in the wide open spaces."*
- *"One of the great wild places left to roam in America, a place to discover...self"*
- *"Lots of outdoor recreation, solitude, scenery."*
- *"Wide open spaces, rough wilderness, and world class climbing/backpacking."*
- *"My impression was a picture of mountains and healthy people/families enjoying nature."*

Geotravelers also commented on the diversity of what Montana offers in terms of both terrain and activities.

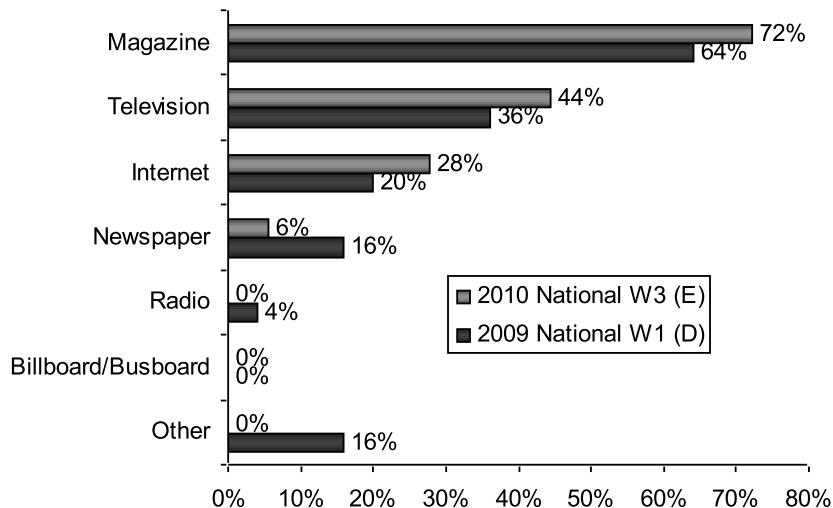
- *"Beautiful countryside, diverse landscapes, open country."*
- *"I believe Montana offers a variety of year round activities."*
- *"Something for the whole family AND for any time of the year."*



Magazines dominant source for advertising

Q: Where did you see or hear the advertising for Montana? (Select all that apply)

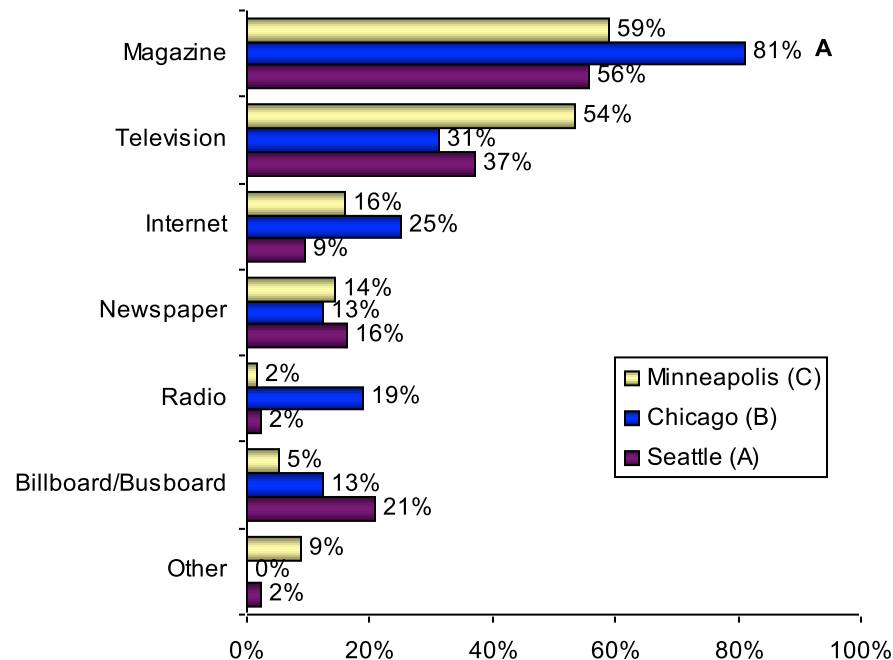
**Where See Advertising
National Population
Wave 1 vs. Wave 3**



The majority (72%) of Geotravelers in Wave 3 who recall advertising for Montana remember seeing it in magazines, followed by television.

Geotravelers aware of the advertising in Chicago are significantly more likely to recall seeing it in Magazines (81%) than those in Seattle (56%).

**Where See Advertising
Media Markets**



Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 158 Geotravelers Aware of Montana's Advertising



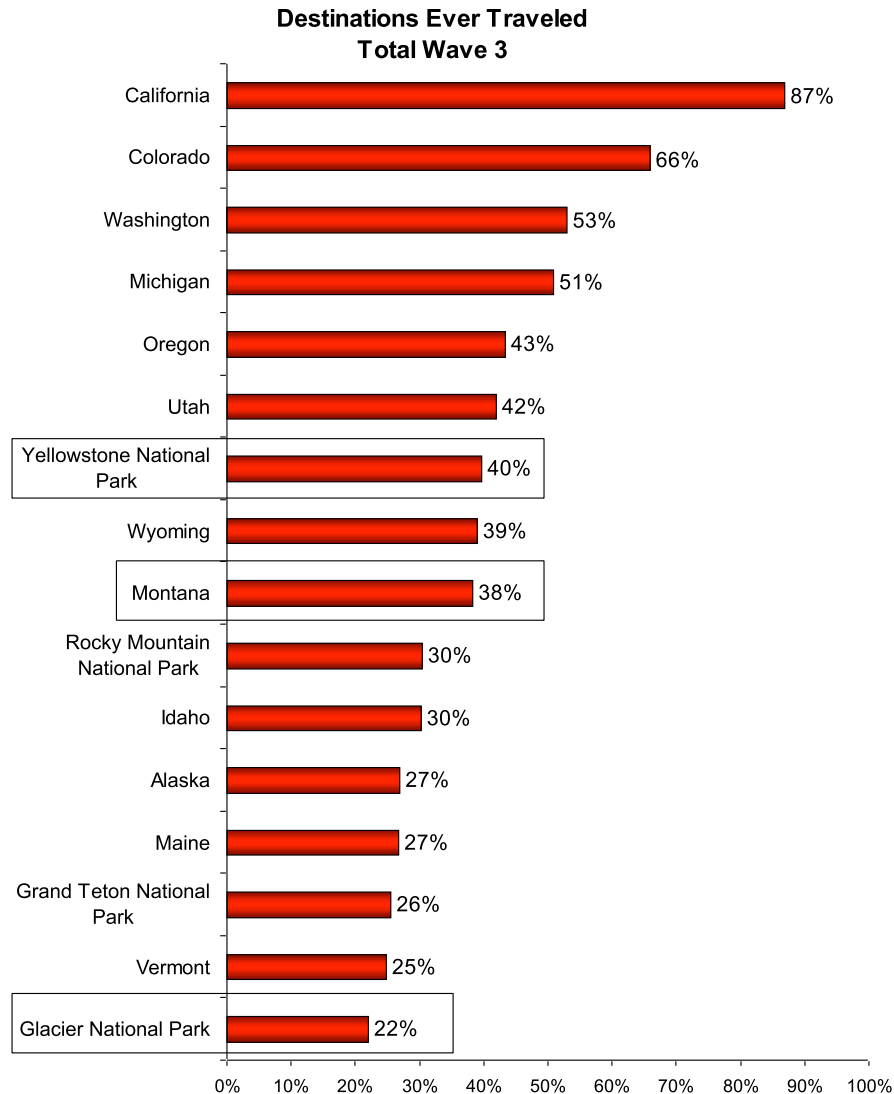


Travel Consideration & Process



Four in ten have traveled to Yellowstone

Q: As an adult, have you ever traveled to any of the following destinations?



- Four in ten (40%) Geotransporters in Wave 3 have visited Yellowstone National Park as an adult, and 38% have visited Montana.
- Glacier National Park has been visited by 22% of Geotransporters.
- As with most destinations, Eisenhower Generation Geotransporters (55%) and Boomers (44%) are significantly more likely to have visited Montana as an adult than Gen X (29%) or Gen Y (26%).

Base = 864 Geotransporters

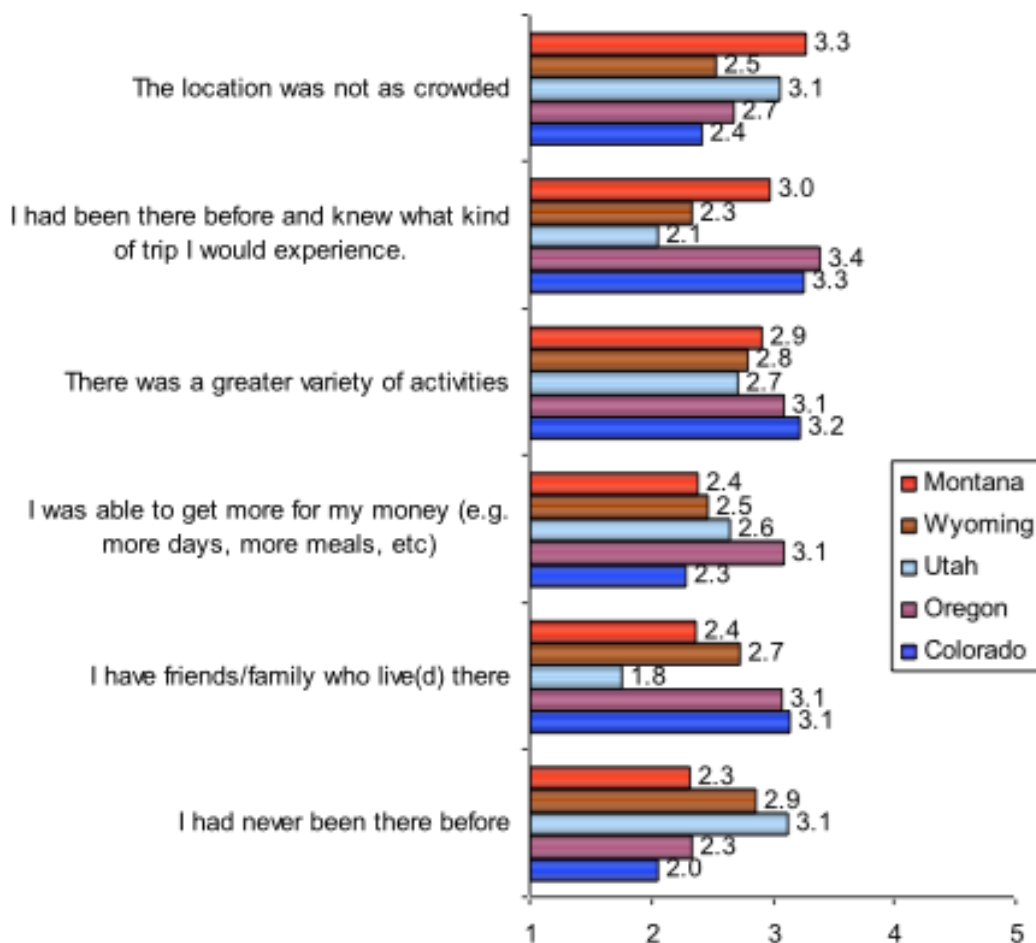


Uncrowded is the top draw to Montana for past visitors

Q: Thinking about your last trip to [Destination] what made you choose [Destination] over another destination you were considering? Please rank the following factors in choosing on a scale of 1-5 where 1 is not at all influential and 5 is very influential.

Travel Considerations By Destination

Top 6 Mean Score



- Geotravelers who have visited Montana rate the lack of crowds as the top factor (3.3) in selecting Montana over other destinations. On this factor, Montana scores higher than all other evaluated destinations.*
- Having been there before and knowing what kind of trip they would likely experience (3.0) is the second strongest consideration to select Montana for Geotravelers who have visited Montana in the past.

Base = Varies based on where traveled.

*Results for Utah and Wyoming are directional due to small base sizes.



Climate & ratings not as high a consideration

Q: Thinking about your last trip to [Destination] what made you choose [Destination] over another destination you were considering? Please rank the following factors in choosing on a scale of 1-5 where 1 is not at all influential and 5 is very influential.



- Geotravelers who have visited Montana rate the climate (2.1) and visitor ratings (2.0) lower as a travel consideration than do visitors to other destinations.

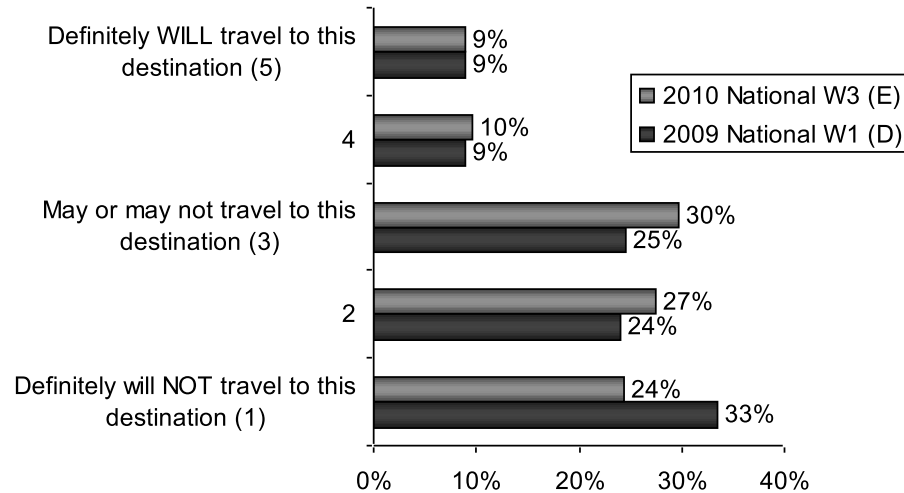
Base = Varies based on where traveled.
*Results for Utah and Wyoming are directional due to small base sizes.



Nineteen percent likely to travel to MT

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

Likelihood to Travel to Montana National Population Wave 1 vs. Wave 3

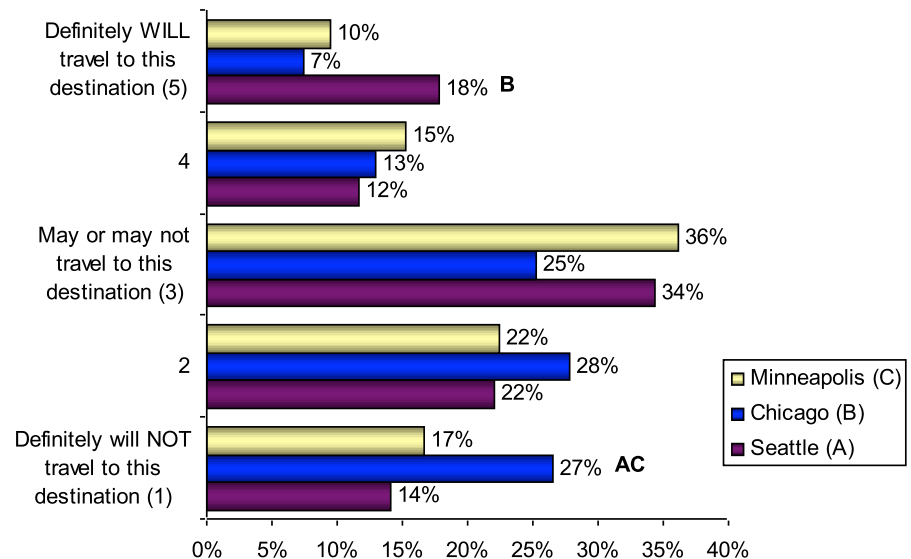


Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 163 Seattle, 162 Chicago, 210 Minneapolis, 224 National US W1, 135 National US W3 Geotravelers

- Nineteen percent of Geotravelers (combining 4 and 5 scores) are somewhat or definitely likely to travel to Montana in the next 18 months with 9% saying they definitely will travel.
- Geotravelers in Seattle are significantly more likely to plan to definitely travel to Montana in the next 18 months (18%) compared to Geotravelers in Chicago (7%).
- Eisenhower Generation Geotravelers are significantly more likely to plan to travel to Montana in the next 18 months (3.1 Mean Score) than Gen X (2.7 Mean Score) or Boomers (2.6 Mean Score).

Likelihood to Travel to Montana Media Markets



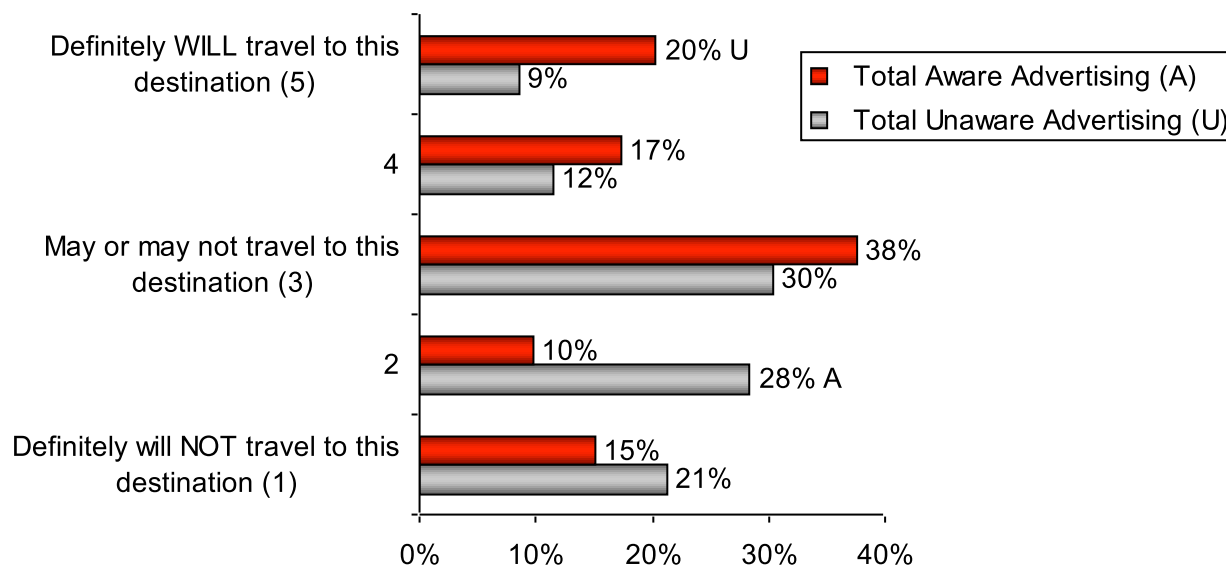


Those aware of advertising more likely to travel to MT

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

- Geotravellers aware of Montana's advertising in Wave 3 are significantly more likely to be definitely planning to travel to Montana (20%) than those not aware of the advertising (9%).
- Thirty-seven percent of those aware of Montana's advertising are likely to travel (combining 4 and 5 score) compared to just 21% of those unaware of the advertising.

Likelihood to Travel to Montana Total Geotravellers: Wave 3



Base = 133 Geotravellers Aware of MT Advertising, 537 Geotravellers Unaware of MT Advertising

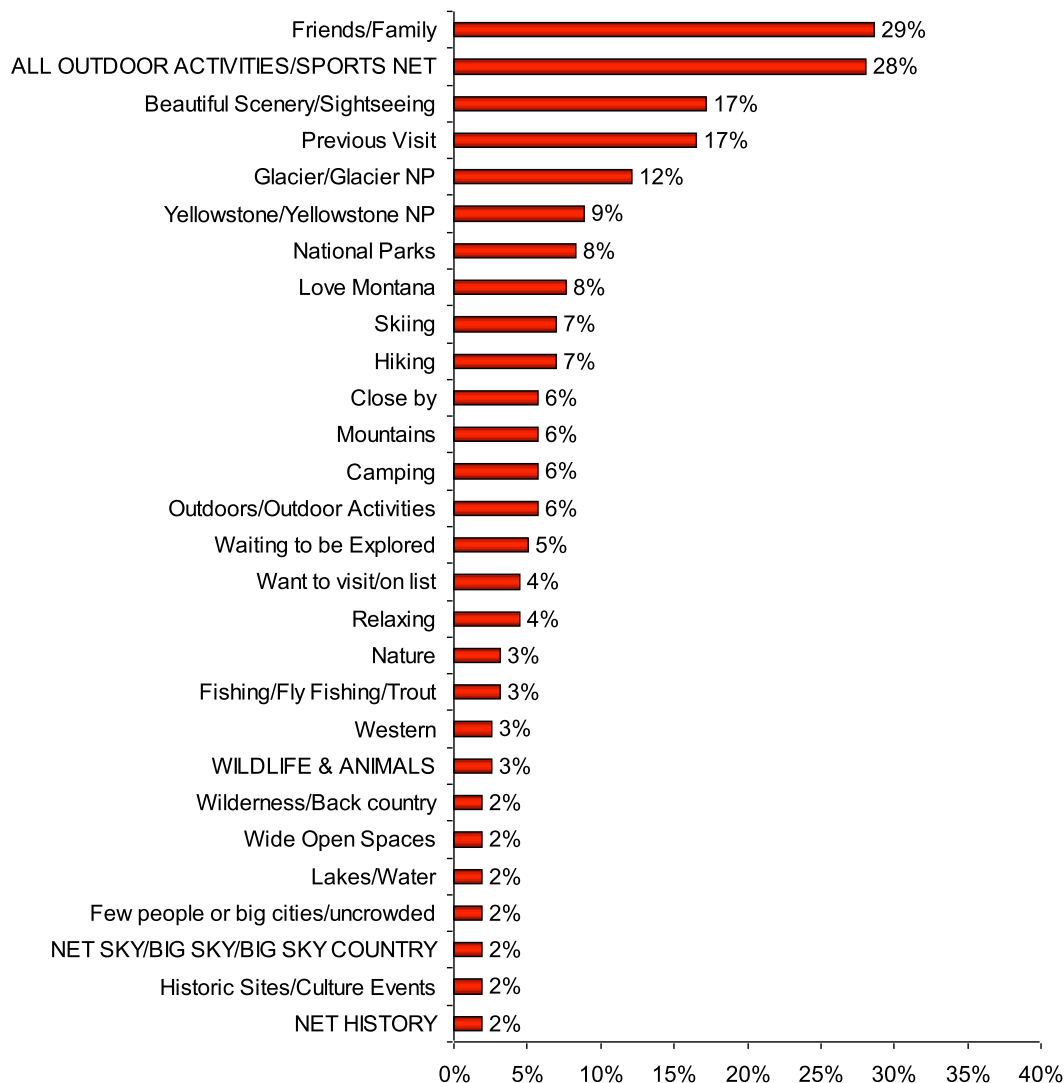
Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.



Friends/family drive this interest in visiting Montana

Q: In your own words, what makes you **inclined** to travel to Montana?

Why Inclined to Travel to Montana



The opportunity to visit friends and family along with their recommendations entice the majority of Geotravelers (29%) who are considering traveling to Montana in the next 18 months.

Geotraveler Comments:

- *"A friend's daughter works at Glacier National Park; I've been there as a child and would like to go back. I love mountains and know that they have so many beautiful areas in that park."*
- *"My mother is from MT and my parents own a place in Bigfork. We go there yearly and go to Glacier, Kalispell, and drive through most of the state on the way from MN. LOVE it there and having been going almost yearly since 1996. We go in the summer and have never gone in the winter, except when I was a child. We enjoy all the shopping, and the wildlife and nature at Glacier. Whitefish is fun too. We go to the art fairs in August."*

Outdoor activities available there are also a strong attraction.

- *"Friends there, good skiing, relaxing trip, friendly people."*
- *"Outdoors - skiing and hiking."*

Base = 157 Geotravelers Might or Definitely Will Travel to MT

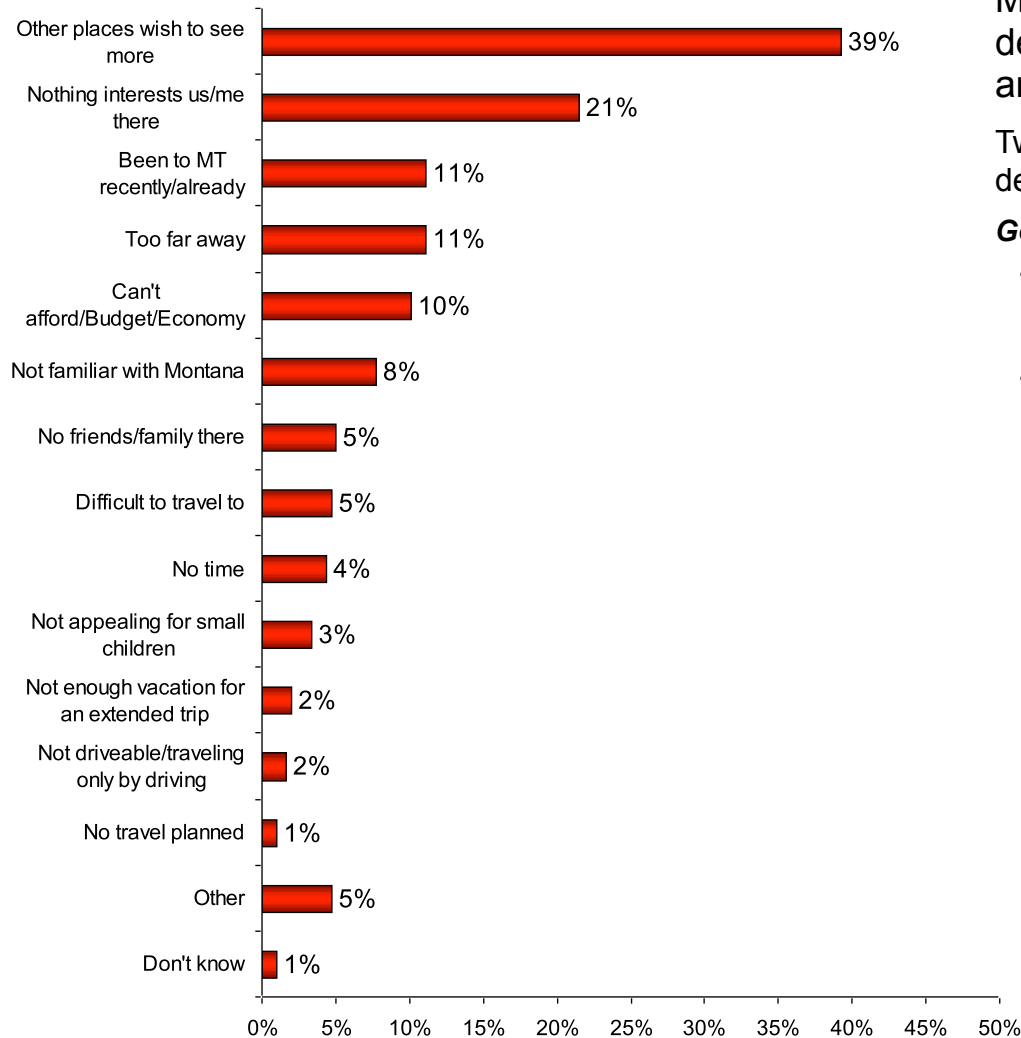
*Comments with lower than 2% incidence not shown.



Other destinations taking precedence

Q: In your own words, what makes you **less** inclined to travel to Montana?

Why NOT Inclined to Travel to Montana



Of those Geotravellers who are not likely to travel to Montana in the next 18 months, 39% have other destinations taking precedence for their travel time and budget.

Twenty-one percent believe there is nothing in Montana they desire to see and 11% have been there already.

Geotraveler Comments:

- "No reason to visit, other places higher on my list of places to see. Unsure what Montana has to offer, have already visited Glacier and Yellowstone. No friends living there."
- "It's too far to travel to from the East Coast with young kids. When the kids are older, though we'll definitely hit it! When I take vacations I like to do things as a family and the things I'd like to do in Montana - sightseeing, hiking, fishing - I think will be better when my kids are older."

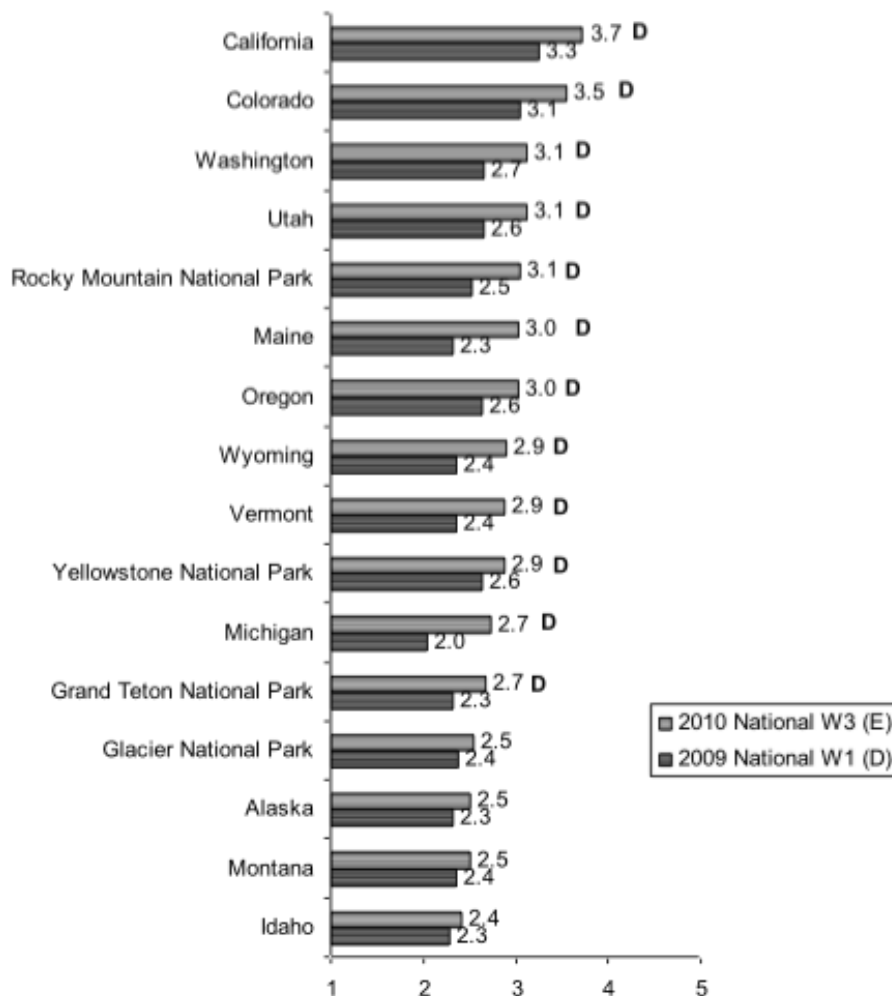
Base = 298 Geotravellers Not Likely or Definitely will NOT travel to Montana



All destinations rise in likelihood to travel over Wave 1

Q: What is the possibility that you will travel to the following destination in the next 18 months?

Likelihood to Travel: All Destinations
National Population : Wave 1 vs. Wave 3
Mean Score



- In Wave 3 all destinations increase in Geotravelers intent to travel, with most destinations including Yellowstone National Park registering significant increases.
- California and Colorado remain the destinations most likely to be traveled to in the next 18 months.

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

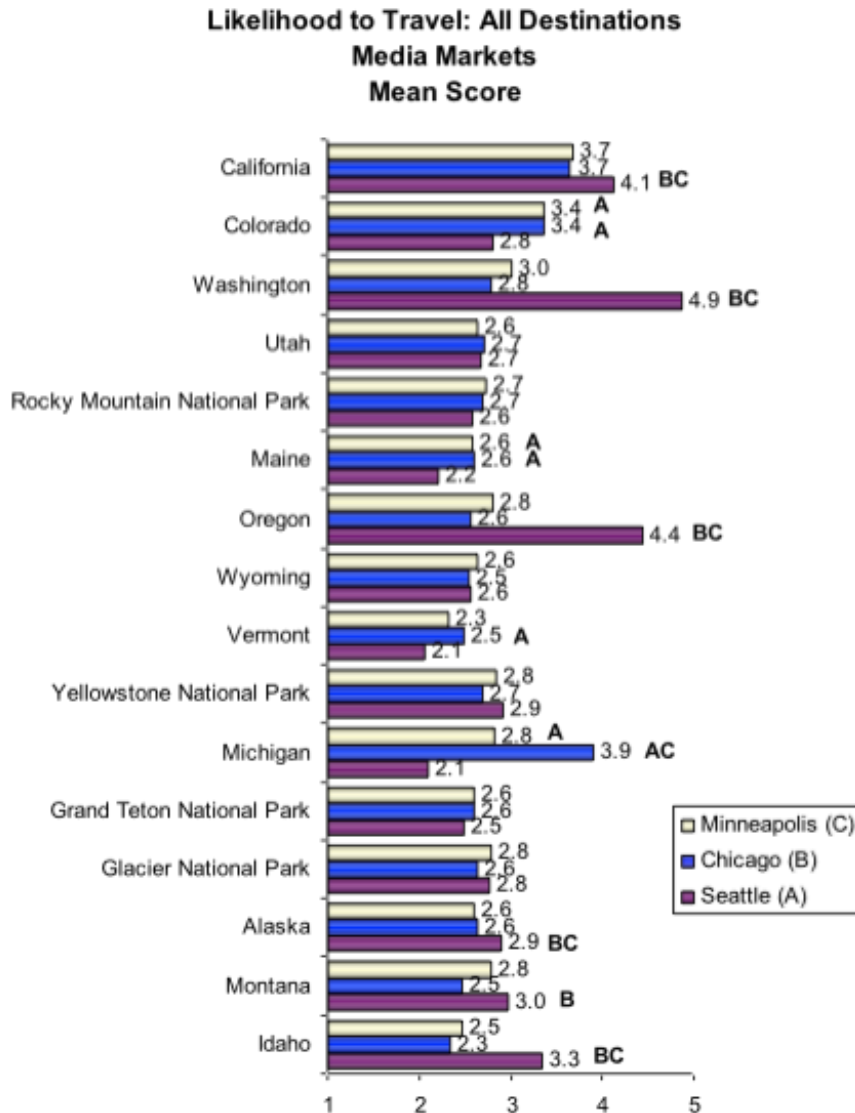
Base = 224 National US W1, 167 National US W3 Geotravelers



Seattle highest likely Geotraveler market to Montana

Q: What is the possibility that you will travel to the following destination in the next 18 months?

- Geotravelers in Seattle (3.0) are significantly more likely to be planning to travel to Montana than those in Chicago (2.5).



Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

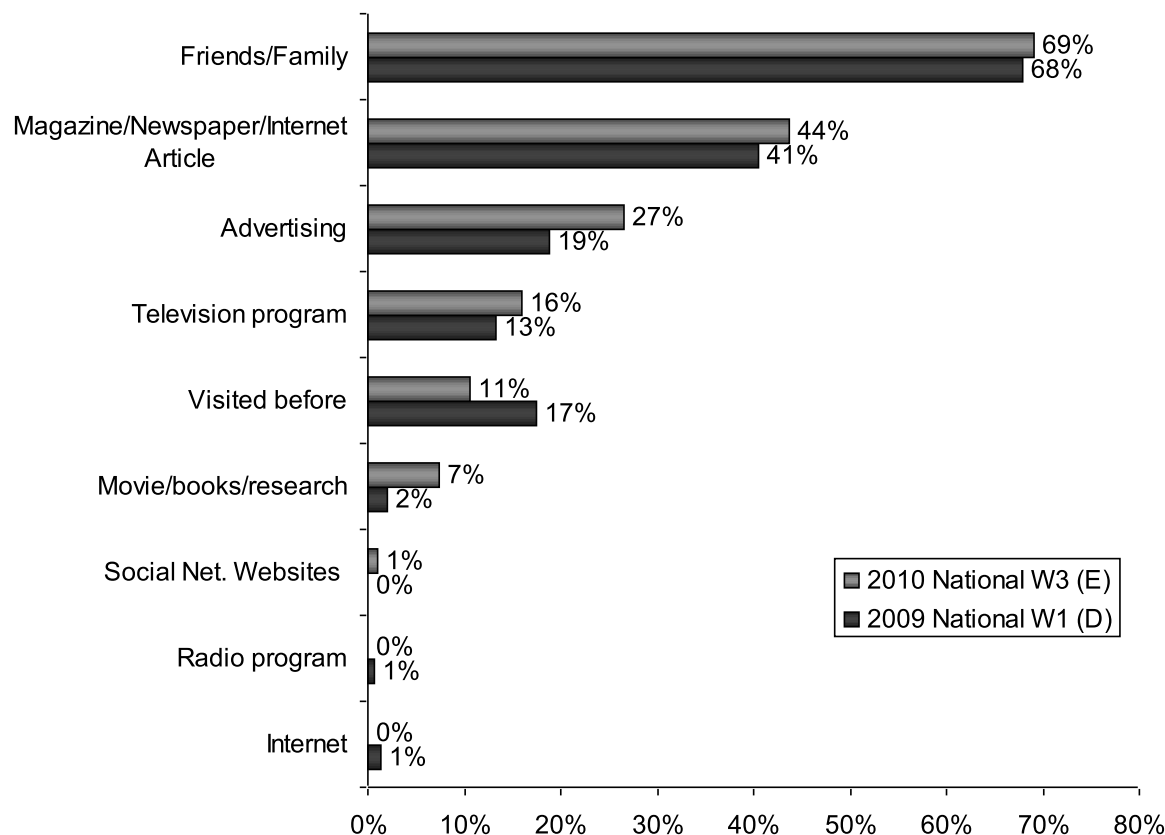
Base = 190 Seattle, 247 Chicago, 283 Minneapolis Geotravelers



Friends/family primary source of information for MT

Q: Do you recall how you heard about Montana as a travel destination? (Multiple responses allowed)

Source for Montana as Travel Destination National Population Wave 1 vs. Wave 3



Almost seven in 10 Geotravelers mention friends or family as a source of information for Montana.

In Wave 3, 27% cite advertising as a source of information

Tripadvisor.com was the only specific website mentioned by any Geotraveler.

Base = 143 National US W1, 94 National US W3, Geotravelers Familiar with Montana

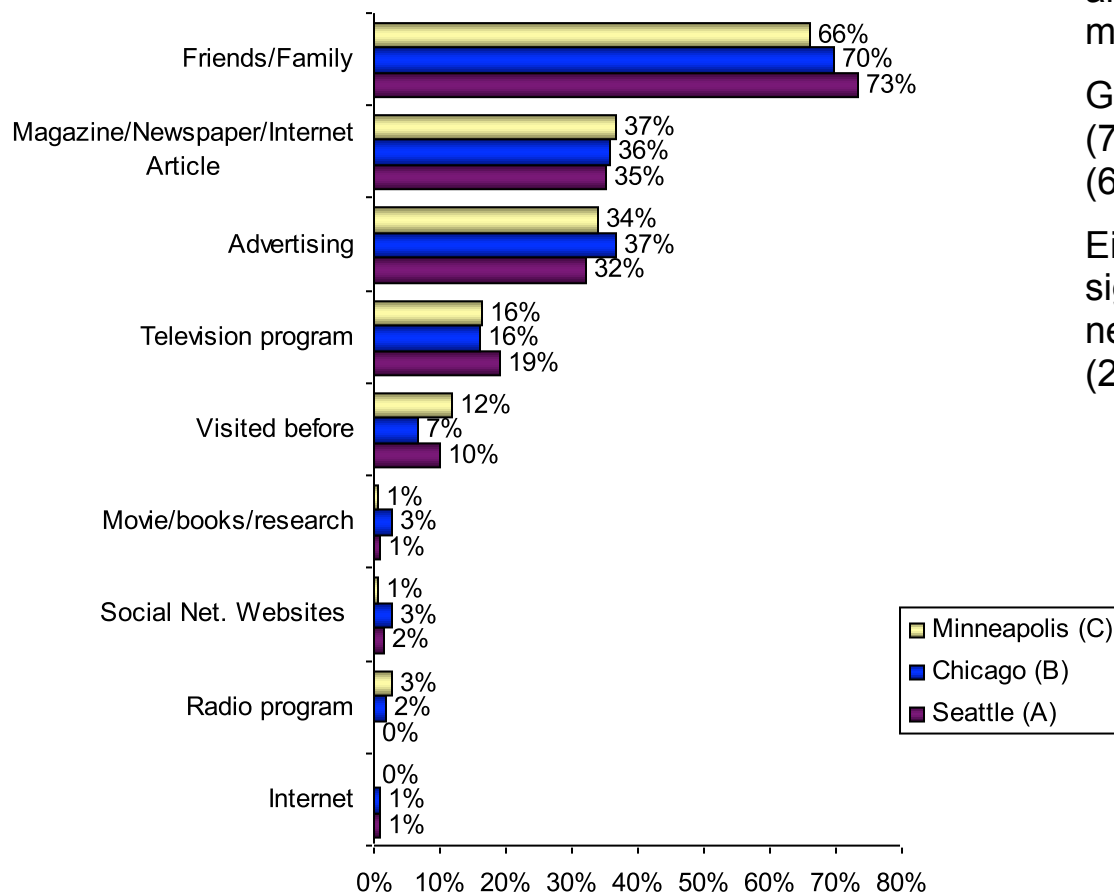




Friends/family primary source of information for MT

Q: Do you recall how you heard about Montana as a travel destination? (Multiple responses allowed)

Source for Montana as Travel Destination Media Markets



There are no significant differences in the source for Montana as a travel destination among Geotravelers from the three media markets.

Gen X Geotravelers are significantly more likely (77%) to mention friends/family than Boomers (65%).

Eisenhower Generation Geotravelers are significantly more likely to mention magazine/newspaper/internet articles (52%) than Gen Y (29%) or Gen X (32%).

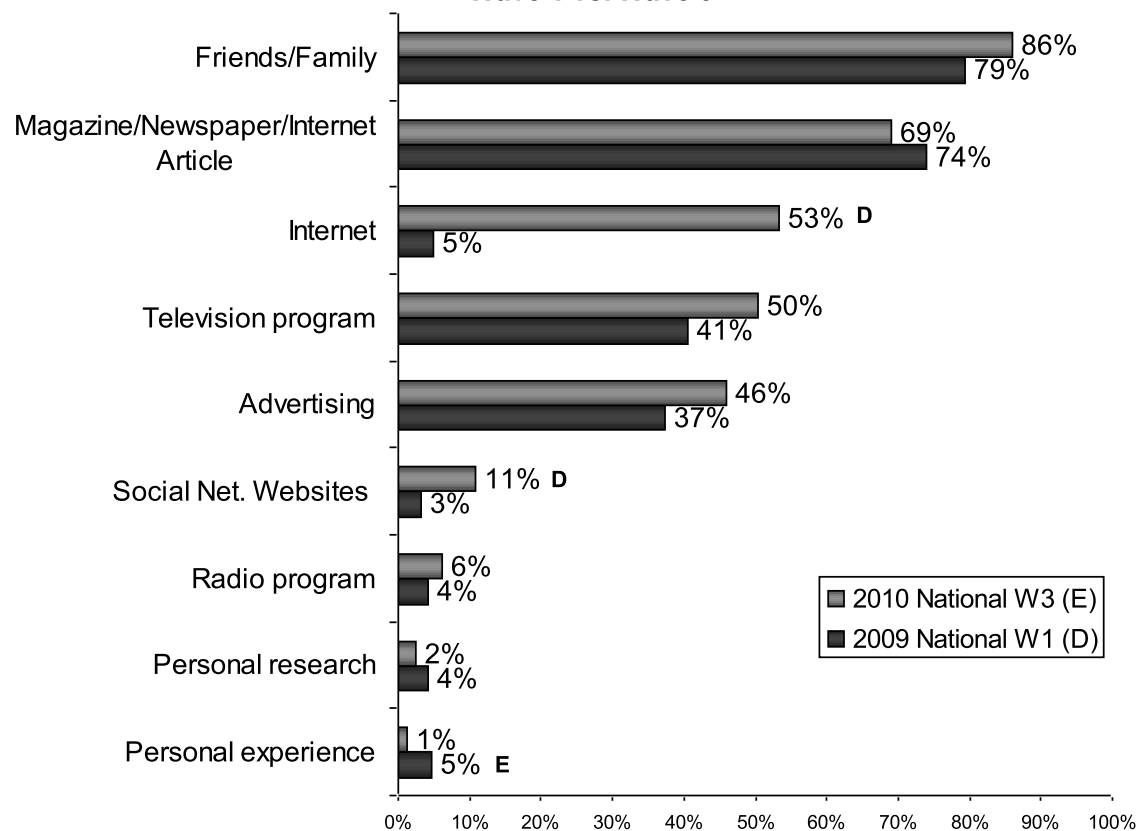
Base = 131 Seattle, 106 Chicago, 153 Minneapolis Geotravelers Familiar with Montana



Social Networking grows in Wave 3

Q: How are you typically made aware of possible travel destinations? (Multiple responses allowed)

**Made Aware of Travel Destinations
National Population
Wave 1 vs. Wave 3**



The same pattern repeats when Geotravelers were asked how they are typically made aware of possible travel destinations.

Social Networking websites experience a significant increase in Wave 3 over Wave 1 with over one in 10 (11%) Geotravelers selecting them as information sources.

In Wave 3, the Internet was added as a specific option in the survey and 53% of Geotravelers selected it as one of their information sources.

Specific sources mentioned include:

- AAA
- Daily Candy
- Endless Vacation
- RCI Timeshare Website
- Rick Steeves
- Direct Mail from Chamber of Commerce

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

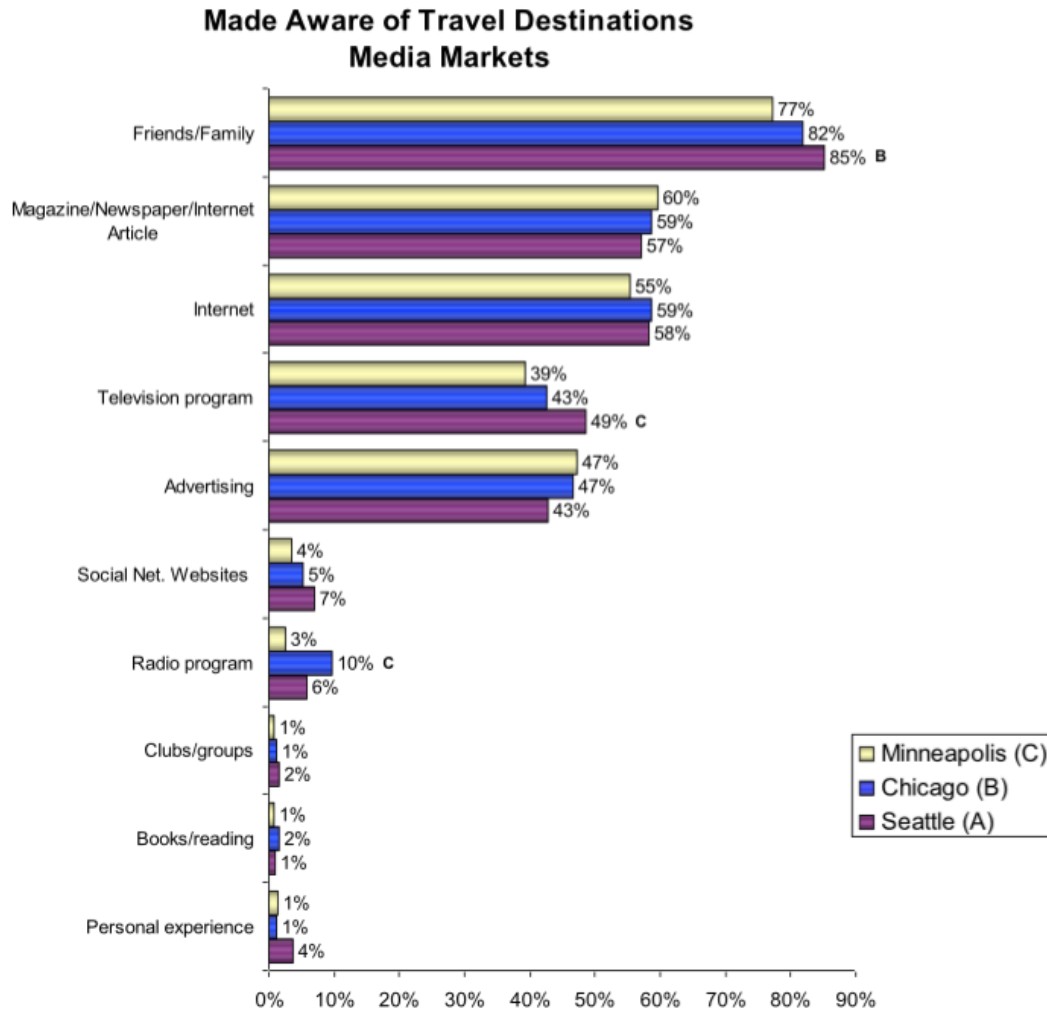
Base = 219 National US W1, 165 National US W3 Geotravelers





Social Networking grows in Wave 3

Q: How are you typically made aware of possible travel destinations? (Multiple responses allowed)



Friends and family and television programs are stronger influences in Seattle, while Chicago is more influenced by radio than Minneapolis.

Base = 189 Seattle, 247 Chicago, 280 Minneapolis Geotravelers

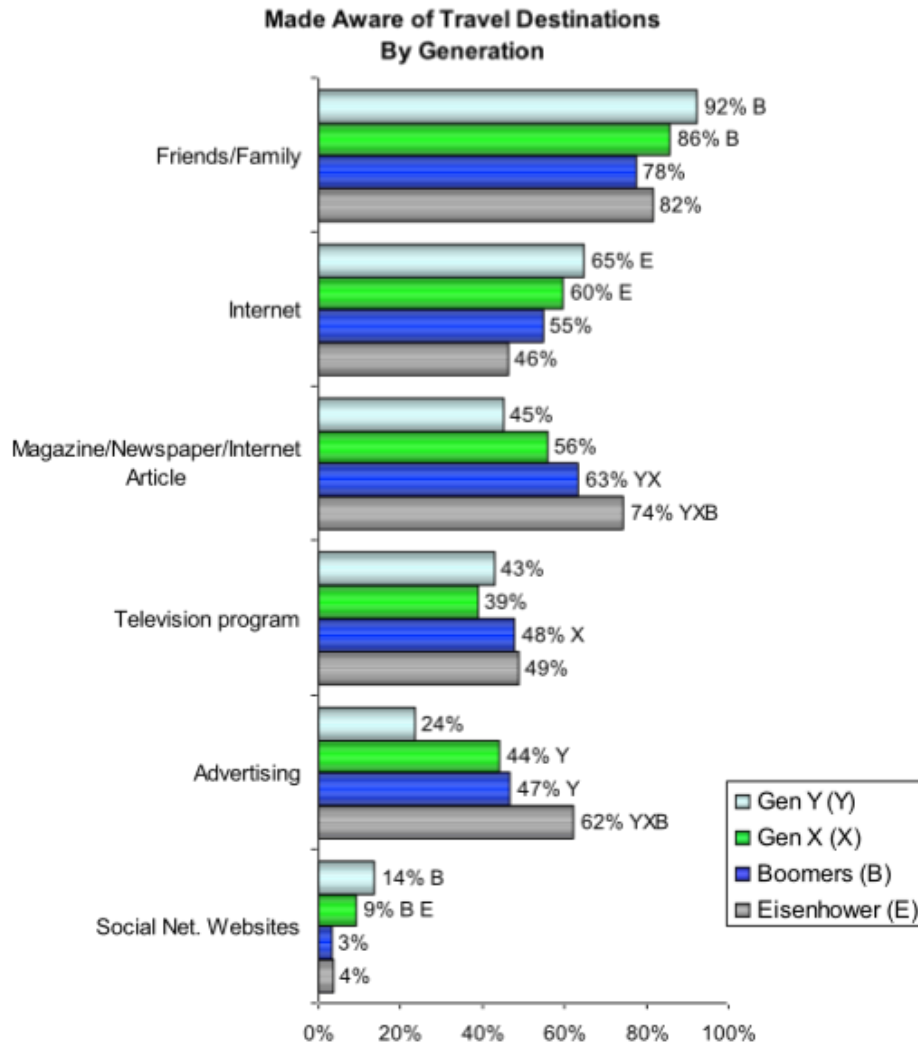
Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

*Comments with lower than 2% incidence not shown.



Young less influenced by advertising

Q: How are you typically made aware of possible travel destinations? (Multiple responses allowed)



How Geotravelers are made aware of possible travel destinations differs significantly by age.

- The Eisenhower Generation is the most likely to select advertising as a source of information for travel destinations, and both Boomers and Gen X rate it significantly higher than Gen Y.
- Gen Y and Gen X are more likely to be made aware by friends/family and the Internet than Boomers or the Eisenhower Generation.
- Boomers and the Eisenhower Generation are significantly more likely to be made aware through magazines, newspaper or Internet articles than Gen X or Gen Y.
- Boomers (48%) are also more likely than Gen X (39%) to list television programming as a source of information for travel destinations.
- Gen Y and Gen X are significantly more likely to be made aware of destinations via the Internet and Social Networking websites.

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

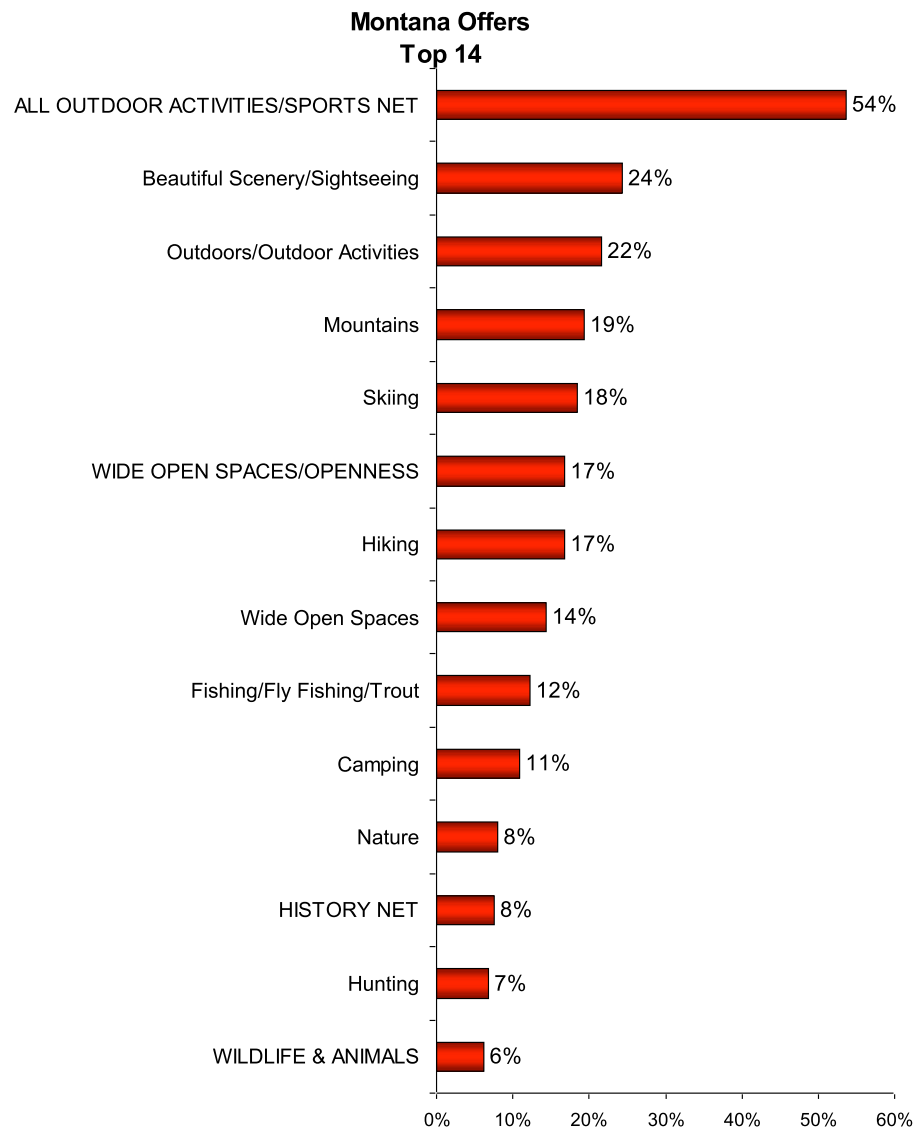


Brand & Competitive Associations



Montana offers outdoor activities and beautiful scenery

Q: In your own words, what does Montana offer to travelers?



Outdoor activities, sports and beautiful scenery top the list of what Geotravelers believe Montana offers. Specific outdoor activities such as skiing, hiking, fishing and camping are frequent responses as well as history and wildlife.

- The Eisenhower Generation (23%) is more likely to mention fishing than Boomers (11%) or Gen X Geotravelers (12%).
- Geotravelers from Seattle (58%) and Minneapolis (59%) are significantly more likely to mention outdoor activities or sports than those from Chicago (47%).
- Minneapolis (28%) and Seattle (22%) Geotravelers are significantly more likely to mention skiing than those from Chicago (11%).
- Geotravelers from Seattle are more likely than those from Chicago to mention fishing (17% vs. 8%) and camping (16% vs. 9%).
- Females (20%) are more likely to mention hiking than males (12%) and males are more likely to mention fishing (16% vs. 9%) and hunting (11% vs. 4%).

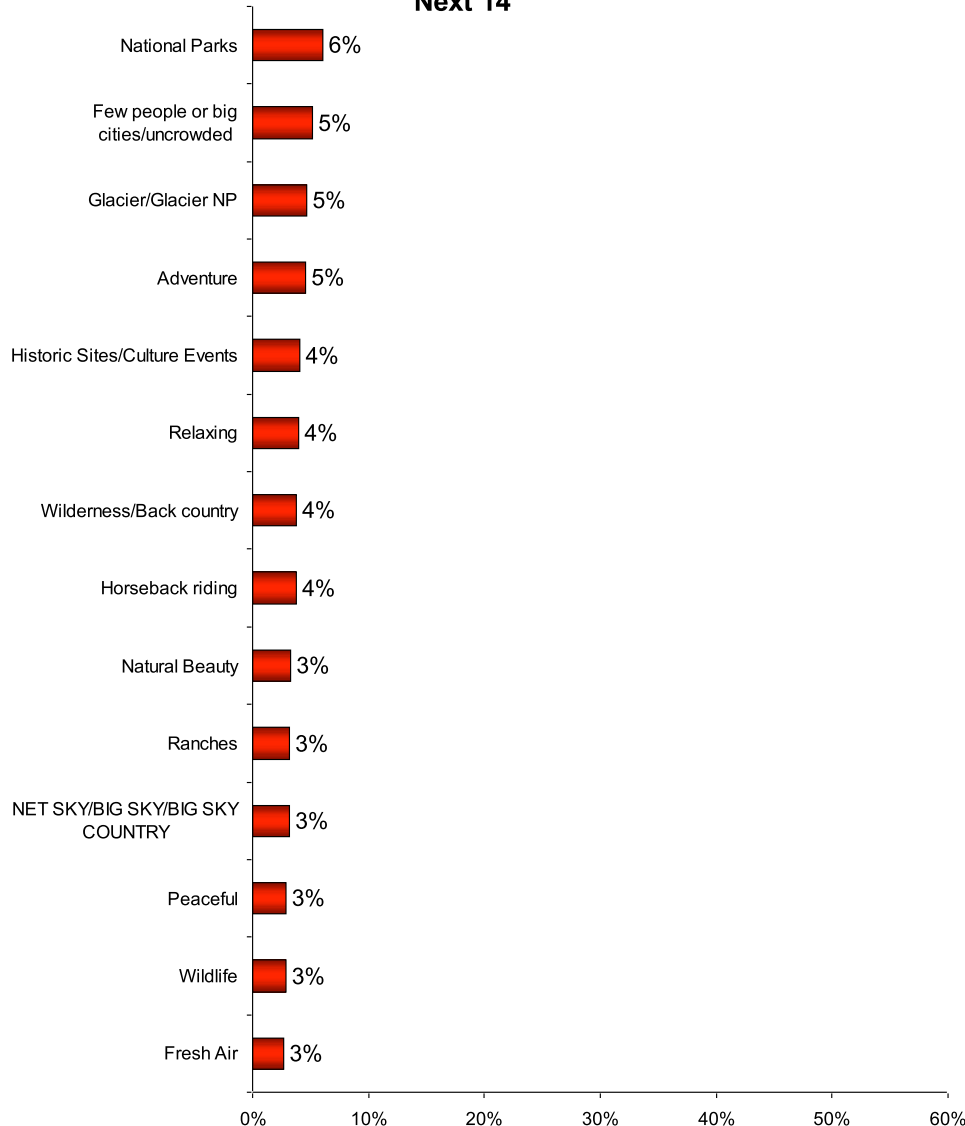
Base = 662 Geotravelers Aware of Montana



Montana offers uncrowded relaxation and adventure

Q: In your own words, what does Montana offer to travelers?

Montana Offers Next 14



Montana continues to offer a contrast to Geotravelers, a relaxing, peaceful place with few people or big cities, while also offering adventure.

Geotraveler Comments:

- *"Adventure, real wilderness, peace and quiet, nature."*
- *"A break from the monotony of day to day city life. Alone time. Fresh air. Nature. Beauty."*
- *"I have not had the pleasure but I understand the mountains to be a wonderful place to camp and explore."*
- *"Breathtaking views in the mountains- backpacking, hiking, camping, horse back riding, skiing."*
- *"An escape from the city life; relaxing ranch life; a taste of the outdoors; a 'cure for claustrophobia' used to be Big Sky's motto."*
- *"A quiet peaceful place to relax away from the city."*
- *"Great outdoor adventures and breathtaking country."*
- *"I am imagining--beautiful scenery, mountain views and fresh air...plenty of hiking, skiing and other outdoor adventures..."*
- *"Beauty, relaxation, adventure."*

*Responses with lower than 3% incidence for all Geotravelers not shown.

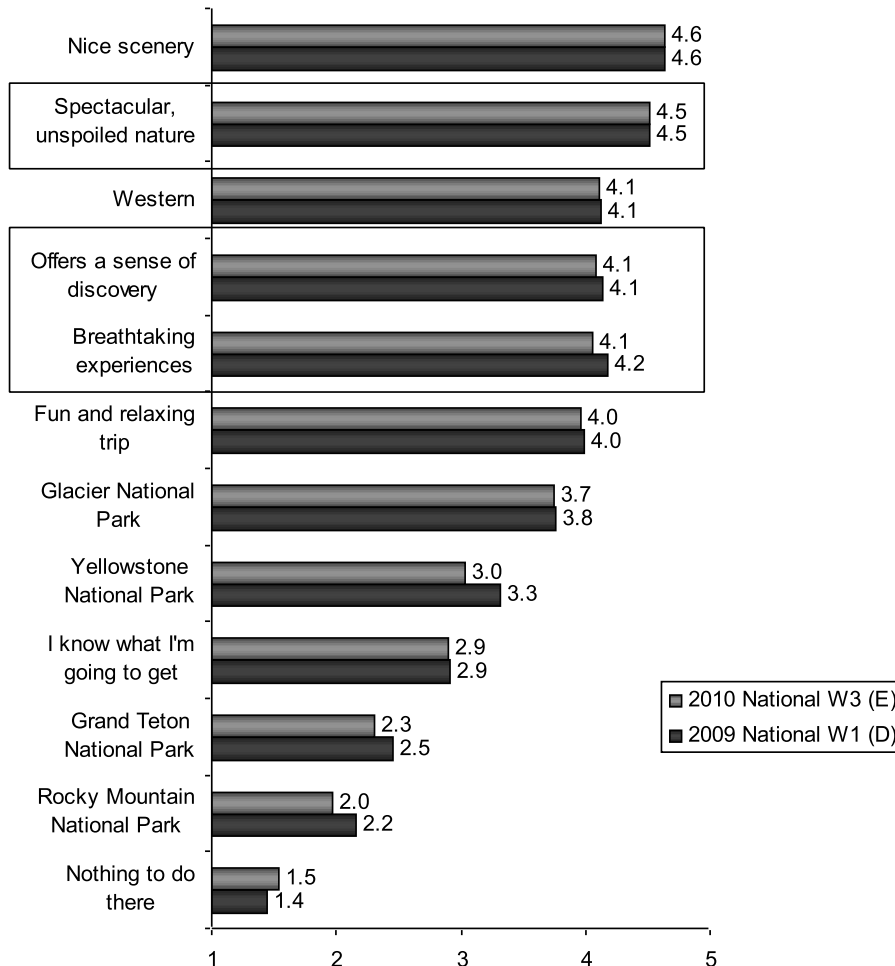
Base = 662 Geotravelers Aware of Montana



Key attributes remain strongly associated with Montana

Q: Rate each of the following in terms of how much you associate it with Montana.

Associate with Montana
National Population : Wave 1 vs. Wave 3
Mean Score



The key attributes focused on in the advertising continue to lead the list of associations Geotravelers have with Montana.

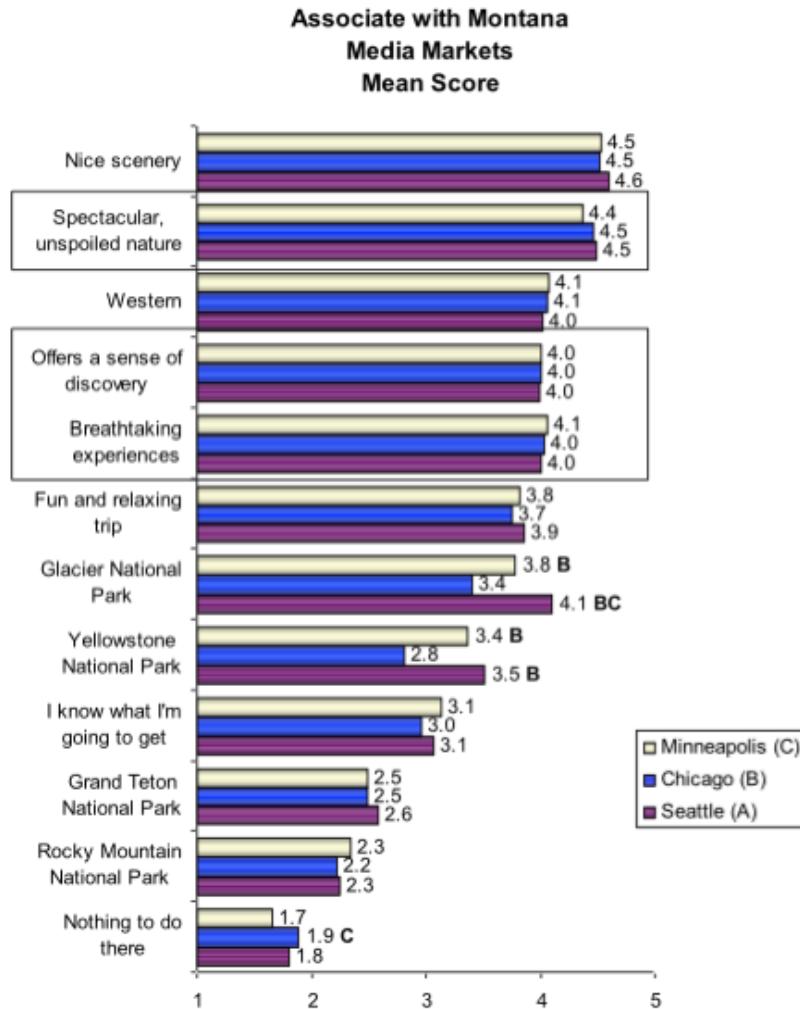
- Boomers (3.9) are significantly more likely to associate Montana with Glacier National Park than Gen Y (3.4) or Gen X (3.6) Geotravelers.
- The Eisenhower Generation (3.8) are the most likely to associate Montana with Yellowstone National Park, over Boomers (3.2), Gen X (3.0) and Gen Y (3.1).
- Females are significantly more likely than males to associate 'Spectacular, unspoiled nature' (4.5 vs. 4.3) and 'Offers a sense of discovery' (4.1 vs. 3.9) with Montana.

Base = 173 National US W1, 135 National US W3 Geotravelers Aware of Montana



Key attributes remain strongly associated with Montana

Q: Rate each of the following in terms of how much you associate it with Montana.



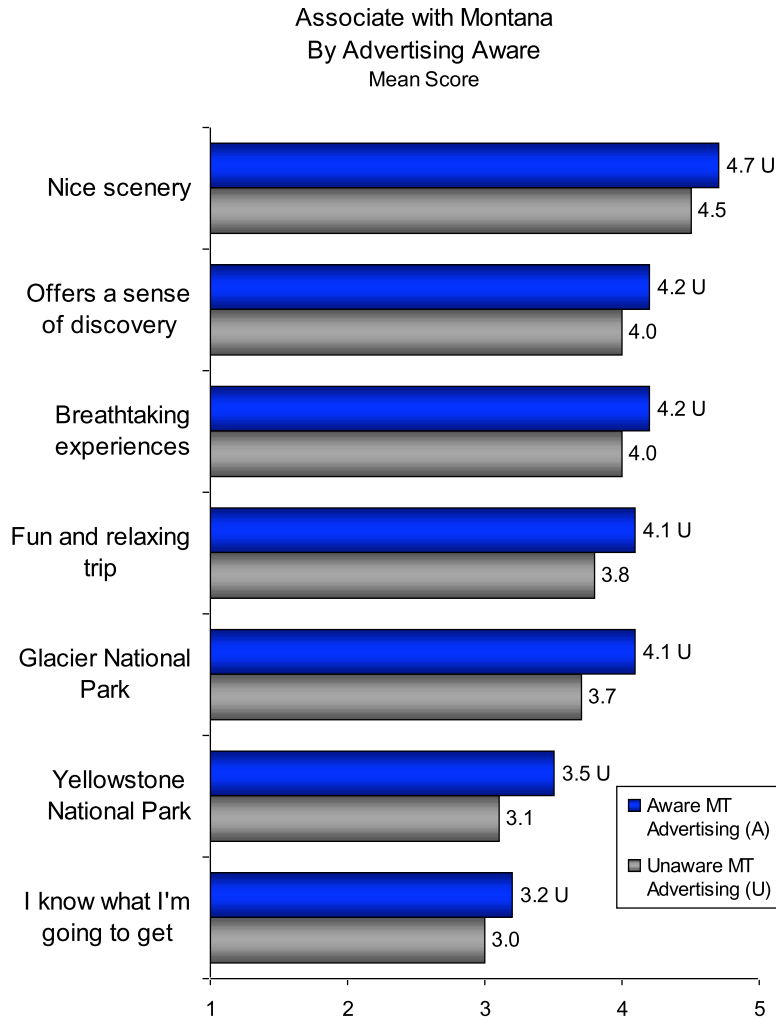
Geotravelers in Seattle (4.1) are significantly more likely to associate Glacier National Park with Montana than Geotravelers in either Minneapolis (3.8) or Chicago (3.4).

Geotravelers in Seattle (3.5) and Minneapolis (3.4) are significantly more likely to associate Yellowstone National Park with Montana than those in Chicago (2.8).



Advertising delivering on two attributes

Q: Rate each of the following in terms of how much you associate it with Montana.



Geotravelers who are aware of Montana advertising are significantly more likely to associate Montana with several key attributes including 'offers a sense of discovery' and 'breathtaking experiences' than those unaware of the advertising. They are also significantly more likely to associate Montana with Yellowstone and Glacier National Parks.

Base = 133 Total Geotravelers Aware of MT Advertising, 537 Unaware

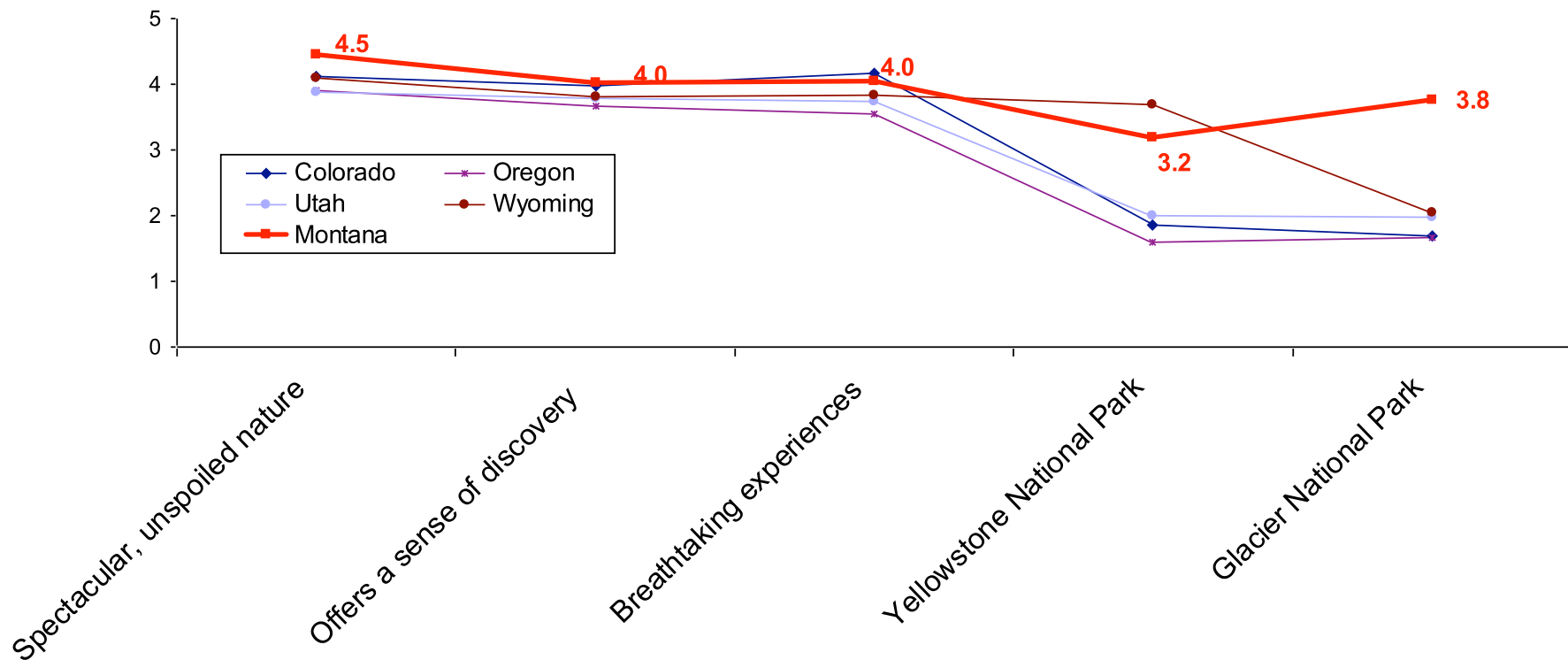


Montana has slight lead on key attributes

Q: Rate each of the following in terms of how much you associate it with Colorado/Oregon/Utah/Wyoming/Montana.

While Geotravelers also associate the three key attributes with the main competitive set of destinations, Montana shows a slight lead.

Key Attributes by Destination



Base = Varies based on awareness of each Destination

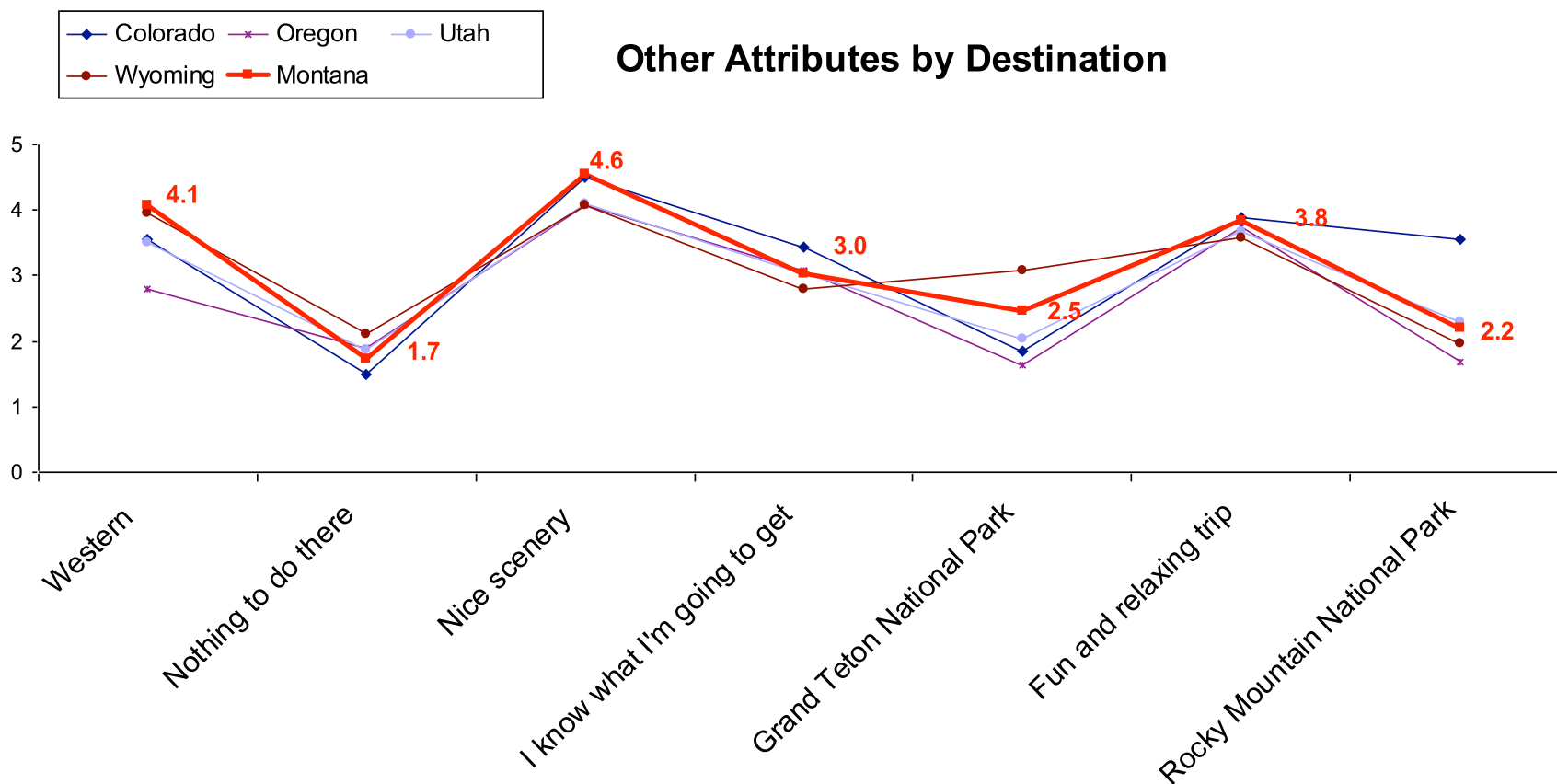




Destinations register similar associations

Q: Rate each of the following in terms of how much you associate it with Colorado/Oregon/Utah/Wyoming/Montana.

The remaining attributes show similar associations across destinations.



Base = Varies based on awareness of each Destination



Next Steps



Leisure Trends Group will conduct the fourth wave of the Awareness study among core Geotravelers the week of May 17th. This post-wave will provide measurement against all the objectives of the study comparing Wave 3 to Wave 4 in the media markets with the national population of Geotravelers as a control group.

Leisure Trends Group will also add 6 core questions from the Awareness survey to Quarter 2 LeisureTRAK* to measure the impact of the campaign on the general population.

*LeisureTRAK

Leisure Trends Group's LeisureTRAK® tracks behavior in over 240 leisure, travel, sports and recreational activities. This ongoing, quarterly study of Americans (4,000 annual interviews) began in 1989 and gives Leisure Trends Group deep insights into how Americans spend their leisure time.

Each quarter, 1,000 online interviews are conducted using scientific sampling and a random online methodology to reach a representative sample of the online American population, age 16 and over. The overall results are projectable to the United States online population, age 16 and over, with a margin of error of +/- 3.0% at a 95% confidence level.



Appendix



Geotravelers

Place a premium on nature, wildlife, being comfortable, great experiences and a sense of exhilaration.
Active in outdoors with both rigorous and/or leisurely activity.

Target Demo:

Adults 25-64
College Graduates
+\$50K HHI

Target Behaviors

Domestic travelers who participate in one or more while on vacation:

Sightseeing
Visiting national parks
Backpacking/hiking
Skiing
Other outdoor sports or recreation
Fishing
Bicycle riding

While target definition changed slightly in 2010, the same screening questions and exclusion tactics were used to ensure accurate trending to 2009 results.



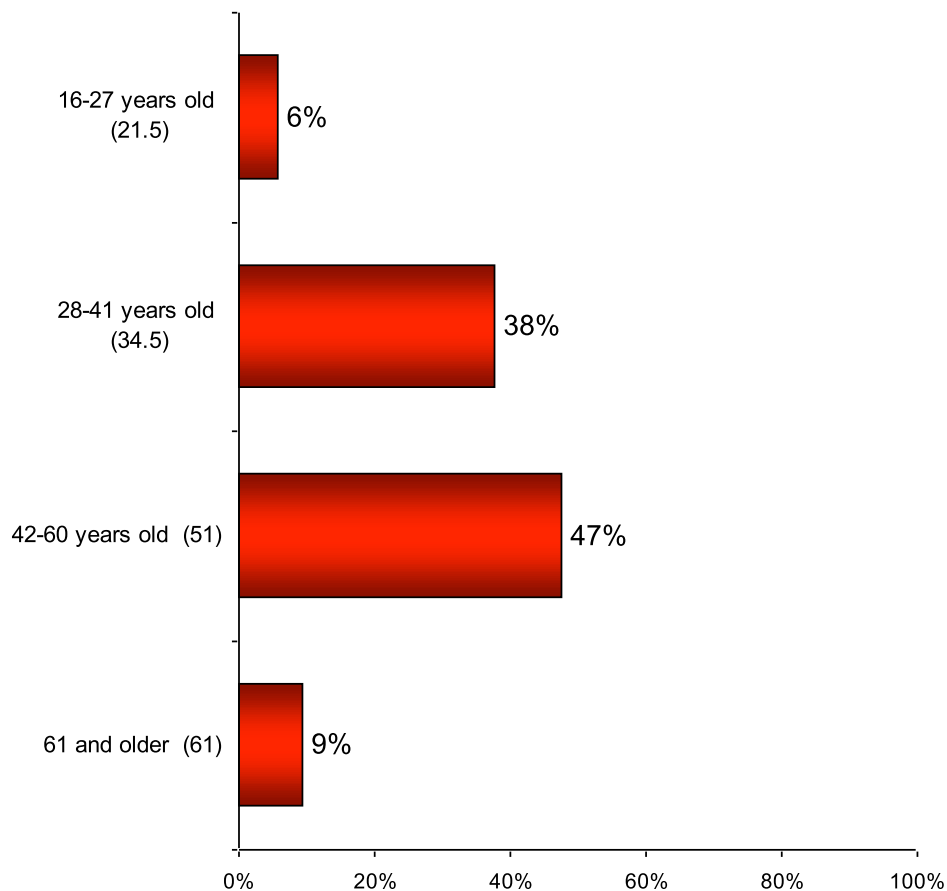
Geotraveler Profile



Geotravelers by Age

Q: Which of the following categories includes your age?

Geotravelers By Age



Mean Age: 44

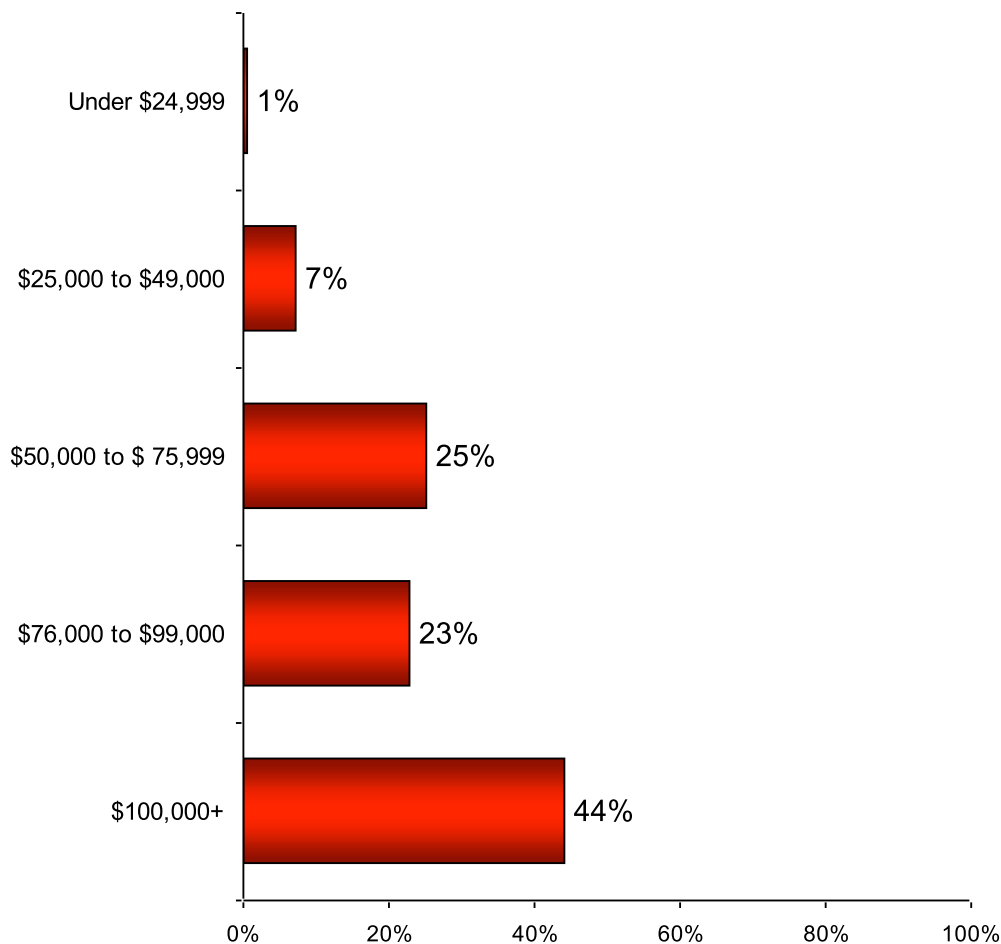
Base =889 Total Geotravelers



Geotravelers by Household Income

Q: In which of the following groups does your total household income fall?

Geotravelers By Income



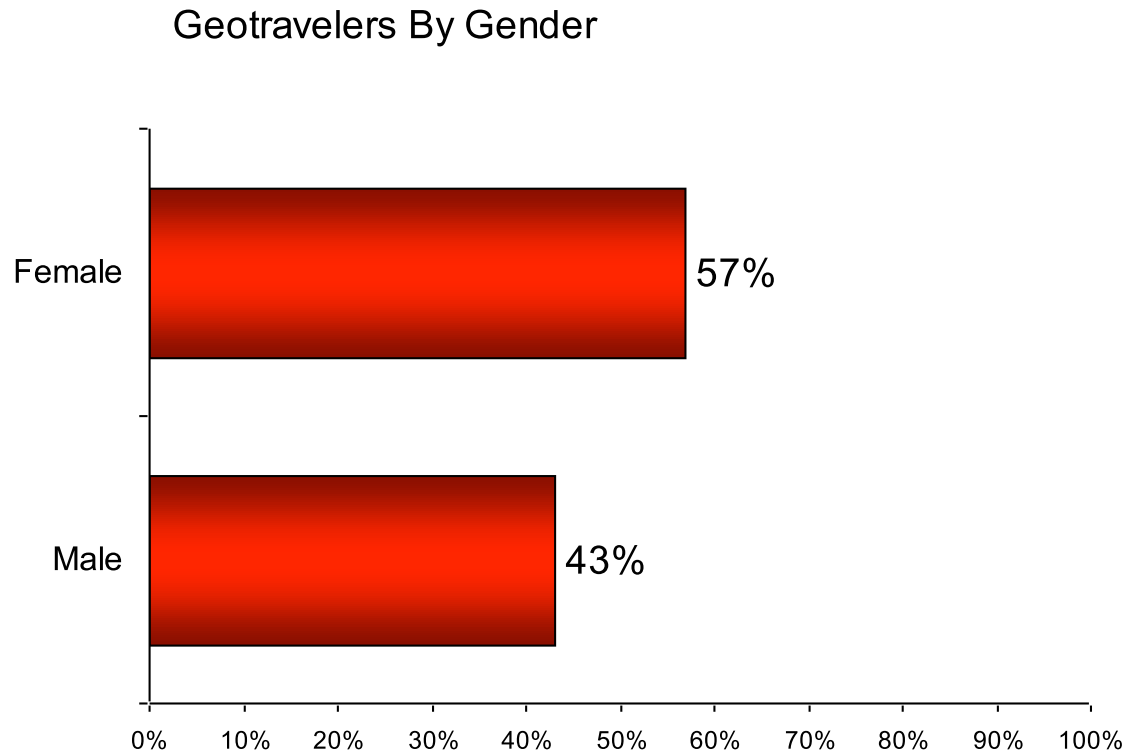
Mean Household Income:
\$76,373

Base =820 Total Geotravelers



Geotravelers by Gender

Q: What is your gender?



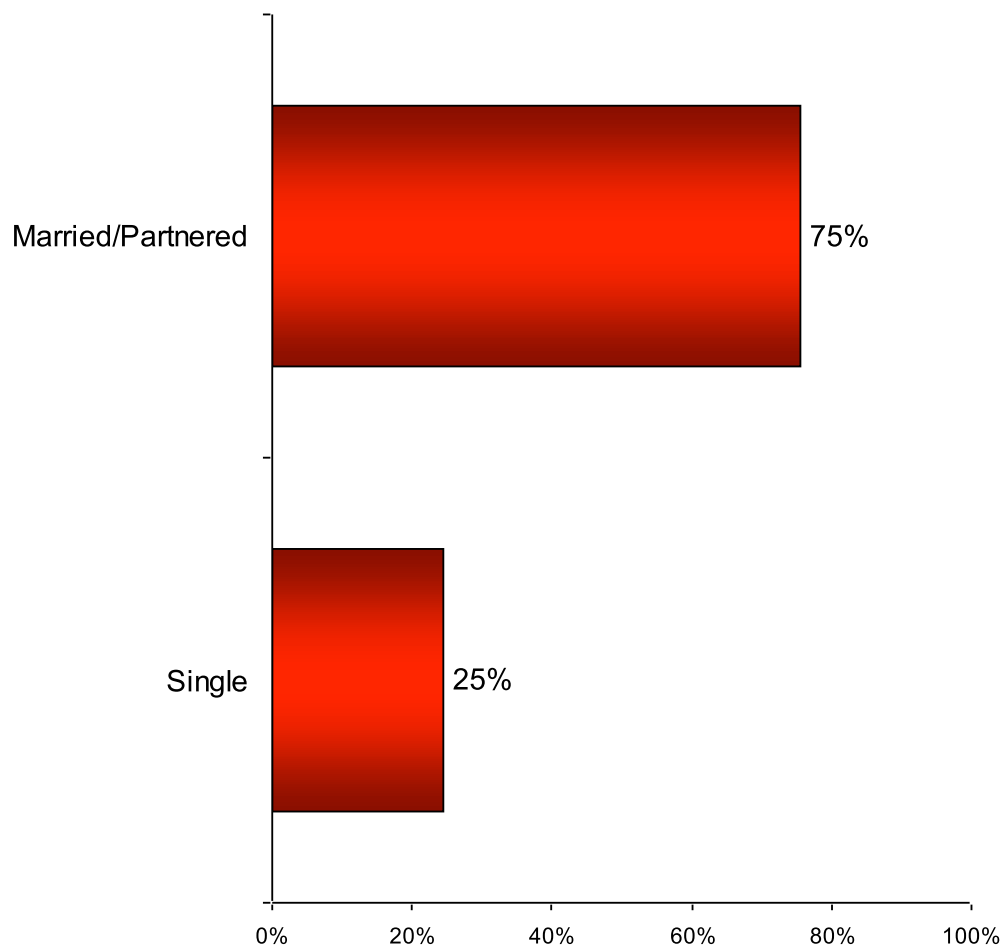
Base = 885 Total Geotravelers



Geotravelers by Marital Status

Q: What is your marital status?

Geotravelers By Marital Status



Base =877 Total Geotravelers



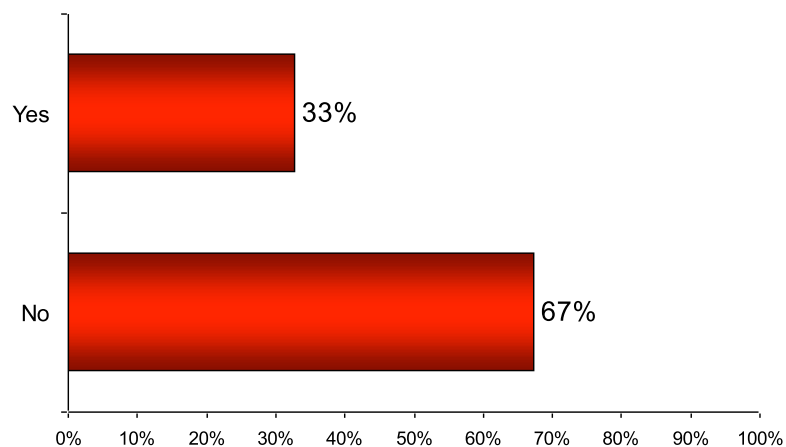


Geotravelers by Number of Children in Household

Q: Are there children, under the age of 18 currently living in your household?

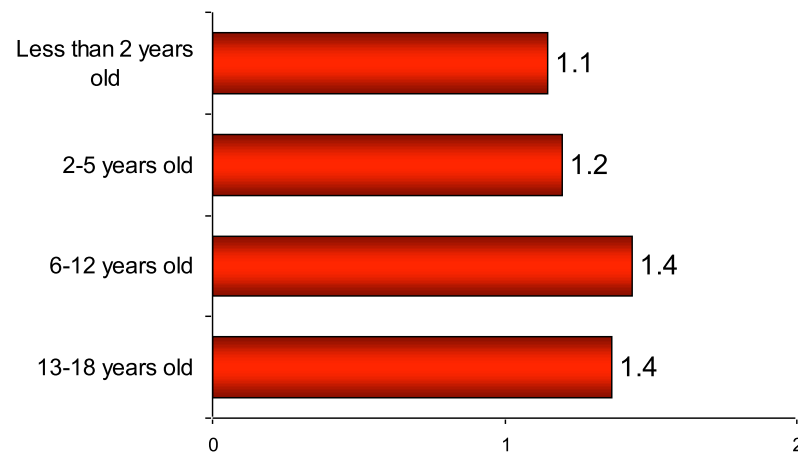
Q: How many children are currently living in your household in the following age ranges?

Geotravelers With Children in Household



Base =891 Total Geotravelers

Number of Children in Household
By Age

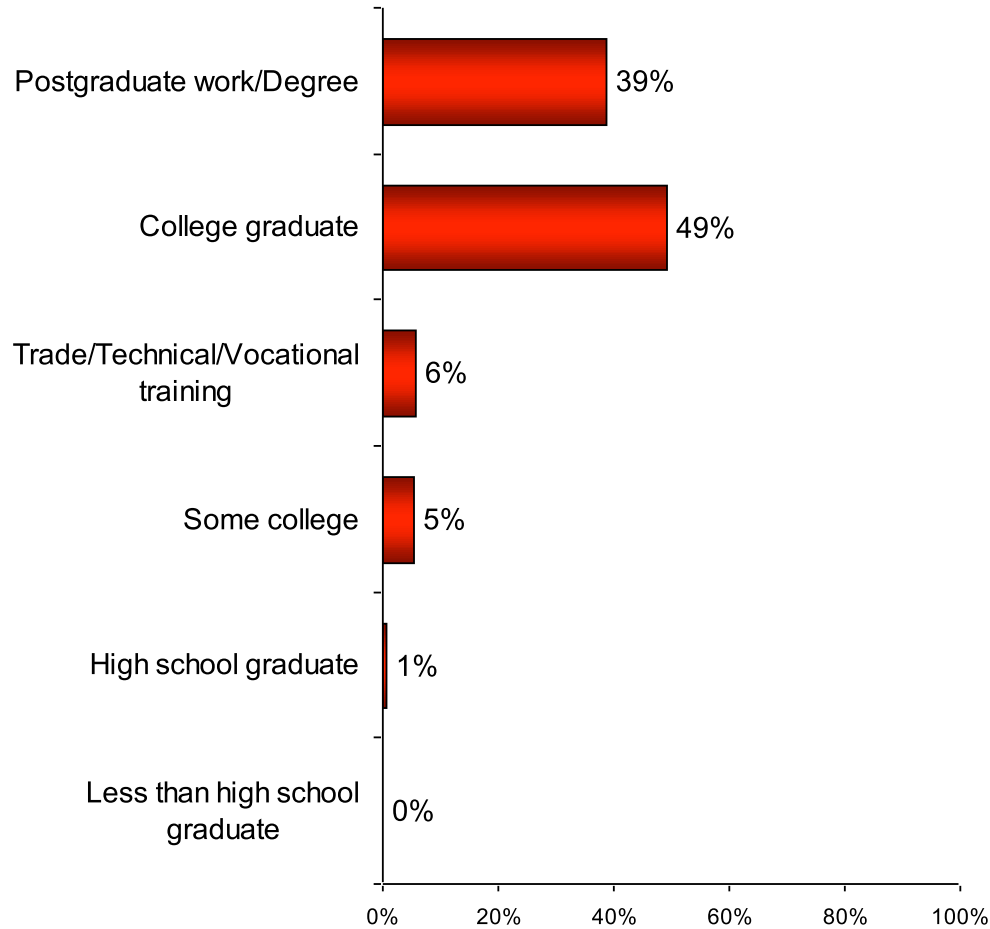


Base =288 Geotravelers with Children



Q: What is the highest level of education you have completed?

Geotravelers By Education

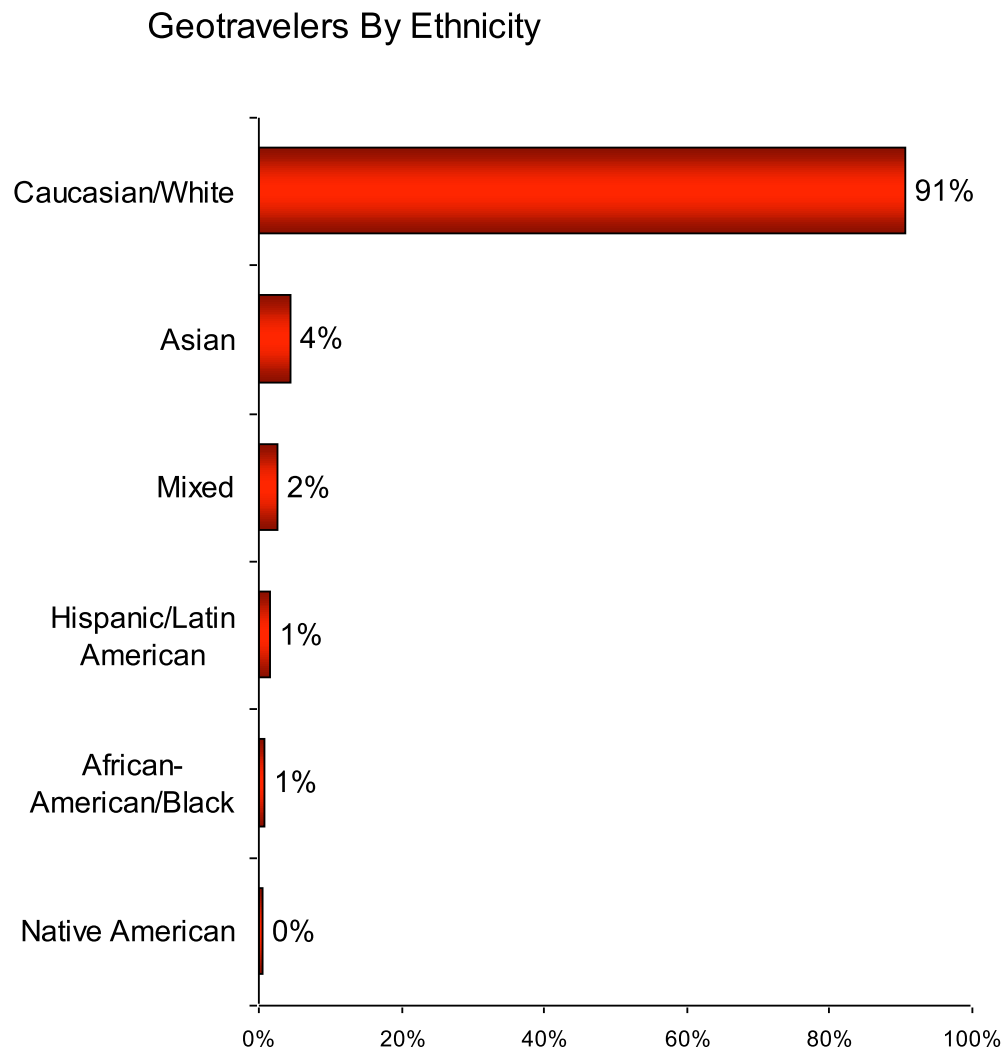


Base =883 Total Geotravelers



Geotravelers by Ethnicity

Q: What is your ethnicity?



Base = 761 Total Geotravelers

